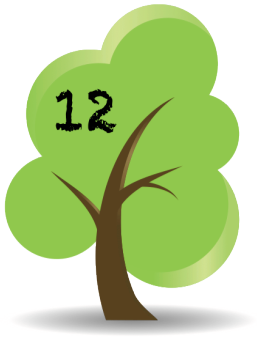

cloudapps
SustainabilitySuite

User Guide

REVISION A

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Overview

The award winning CloudApps Sustainability Suite is the only complete cloud-based software for integrated sustainability management and employee engagement. CloudApps Sustainability software is helping our customers to:

- **Reduce energy, water, waste & business travel costs** through operational efficiency gains, goal setting and employee engagement programs
- **Improve their social responsibilities** through the promotion and targeting of CSR initiatives and employee engagement programs
- **Eliminate exposure to environmental reporting risks** through the accurate maintenance of inventories and disclosure reporting
- **Win the talent retention and acquisition battle** by engaging employees in corporate sustainability initiatives
- **Improve corporate performance** through cost reduction, increased revenues and customer loyalty

CloudApps Sustainability Suite supports the “journey to sustainability” (depicted above) and has been designed around this journey so that it may be followed in a logical sequence. Furthermore, the administration area is also arranged to broadly align with this journey in order to simplify the overall process for the sustainability administrator.

The “journey to sustainability” enables organisations to:

Measure and analyse the environmental, social and economic impact of your business operations. Provide complete operational insight, from the basement to the boardroom via detailed inventories. Enabling you to quickly identify “hot spots” and focus areas for cost reduction or CSR initiatives.

Disclose progress against carbon emission goals to voluntary or statutory reporting bodies. Allowing you to automate the production of disclosure reports and eliminate exposure to compliance risk.

Align your entire organisation behind corporate sustainability goals. Drive ownership across your business through the allocation of budgets and targets that will maximise cost savings by geography, division, facility, department, product line or employee

Engage with every employee, provide personal performance indicators, engender healthy competition with targets and rankings, drive behavioural change via challenges, facilitate collaboration and harvest employee ideas.

Deliver against selected sustainability initiatives that reduce your consumption of natural resources and drive out cost and waste. Bring together teams to collaborate on your chosen CSR initiatives and accelerate a successful outcome

Increase Revenue through the provision of sustainable products & services, increased customer loyalty, improved employee retention and an enhanced brand

CloudApps Sustainability Suite is built on the award winning Force.com platform from salesforce.com, the first platform as a service (PaaS), allowing for an entirely on-demand and without software application. This platform also includes easy-to-use, point-and-click customisation tools to help configure the application to meet your own unique business requirements, without any programming experience.

General Introduction

The key areas of the CloudApps Sustainability Suite are summarised below. Each of these areas is described in full detail in their respective sections of this User Guide. It should also be noted that the administration tasks are broadly arranged to align with the 'journey to sustainability' that is described in the overview above.

Sources

Data Sources (simply referred to as Sources in the application) are the point within the application where sustainability data is initially captured and recorded. Sources can be related to Environmental, Social or Economic Sustainability data. Examples of sources include meters for Electricity, Natural Gas and Water, non-metered fuels such as Diesel, LPG and Coal, Health & Safety incidents, Volunteer hours, Charitable donations, Process or Fugitive Emissions, Business Travel, Freight Transport and Waste Disposal. These are however just examples of sources as the system is flexible enough to capture data for practically any type of data source.

Source Keys

CloudApps Sustainability Suite utilises a unique source key to tag data, reduce errors and simplify the process of calculating greenhouse gas emissions from environmental data sources. This key automatically tags the data with "type" and multiple levels of "subtype" information and identifies emission conversion factors for each of the individual (and groups of) greenhouse gases (GHG's) covered under the Kyoto protocol. Tagging each source item record with an appropriate and easy to understand source key is instrumental in categorising data for reporting and in helping to ensure an appropriate and accurate calculation of resulting greenhouse gas emissions.

Inventories

The information captured and recorded in Data Sources is processed into Inventories. Each Source is associated with an Agreement, which in turn defines a set of Posting Rules that are used to populate individual inventories for anything that needs to be measured. Inventories can be established to maintain balances for any type of Sustainability information, including for example, CO2 emissions, health & safety Incidents, water use, waste handling processes, charity donations, fugitive emissions, energy consumption, volunteer hours and much more. These inventories maintain a record of all the individual transaction entries as well as monthly closing balances and a cumulative count.

Disclosures

Information Disclosures provide the means of disclosing an organisation's greenhouse gas emissions to both regulatory and voluntary bodies as well as for more general use disclosures (e.g. internal disclosing formats). The scope and the type of information that needs to be disclosed will vary between each regulatory and voluntary body, however the process for disclosing information remains the same. This flexibility allows an organisation to capture their emissions source data once and then disclose it many ways. CloudApps Sustainability Suite supports information disclosures for the UK's Carbon Reduction Commitment Energy Efficiency Scheme (CRC) and the Investor Carbon Disclosure Project (CDP is a popular reporting standard used by more than 3,000 organisations in 60 countries). In addition a general (templated) disclosure mechanism is also available which works in conjunction with Conga Composer (licences purchased separately) allowing organisations to create their own templates (in Microsoft Word, PowerPoint or Excel formats).

Goals

Organisations typically define a set of corporate sustainability goals that span a number of years and which allow measurement and comparison against a baseline period for a prescribed organisational boundary. Sustainability Goals provide the means for defining these goals, measuring performance against goals in real-time and allocating out budgets and targets across the organisation to ensure that the goals are achieved. Actual performance is calculated from the appropriate inventories and current period projections are made in order to provide early insight as to whether each goal is on track to be achieved.

Performance

Performance Centres allow Sustainability data to be aligned to the business structure of an organisation. Transforming and allocating the data from source structures into business structures provides for more effective control and management of the key sustainability indicators (Performance Indicators). Performance Indicators are automatically created and aligned to the periods within which the business is managed e.g. Fiscal Quarters and years. Budgets can then be assigned to the Environmental performance indicators (that need to be controlled and reduced), whilst targets can be defined for Social and Economic indicators (that have been targeted for increases). These budgets/targets are in turn aligned to the overall Sustainability Goals of the organisation ensuring that there is no disconnect between the operation of the organisation and the overall goals that have been set for the organisation.

Initiatives

Sustainability Initiatives can be divided into two broad categories, CSR Initiatives and GHG Reduction Programs. Reductions Programs provide a mechanism for organisation's to reduce their carbon emissions, energy consumption, use of natural resources and disposal of waste. Each reductions program targets a different area of resource, energy or waste savings, each resulting in reduced greenhouse gas emissions which can be presented on a MACC chart. Taken together the impact of implementing a number of reductions programs can significantly reduce an organisation's GHG emissions, energy costs, use and disposal of natural resources. In contrast to Reduction programs the CSR Initiatives focus on improving the organisations social responsibilities by monitoring and tracking each CSR initiative that is being undertaken.

Getting Started

Browser Support & Configuration

Full details of standard browser support and configuration can be found here. Please note that whilst the application can be run in Microsoft Internet Explorer versions 7 and 8, support and bug fixes will only be provided for issues that are reproducible in Microsoft Internet Explorer version 9, the most recent stable version of Mozilla Firefox, the most recent stable version of Google Chrome, the Google Chrome Frame plug-in for Microsoft Internet Explorer 6 or Apple Safari 5.1.x. It should also be noted that the use of Internet Explorer version 9 is strongly recommended by Salesforce.com over versions 7 and 8 (version 6 is not supported). All browsers must have JavaScript, cookies and SSL 3.0 enabled. A minimum screen resolution of 1024 x 768 is also strongly recommended however for the best possible user experience a screen resolution of 1280 x 800 or better is preferred.

Logging In

To log into the application go to the CloudApps login page: login.cloudapps.com

For further details on activating your computer, setting you password and retrieving forgotten passwords please see the relevant section of the Salesforce online Help & Training by clicking here.

CloudApps Sustainability Suite has been built to take advantage of features available in the Enterprise Edition of the Force.com platform and the modern user interface theme that was introduced in February 2010. Enterprise Edition has been designed to meet the needs of large and complex businesses and includes Web services API support. By default CloudApps will provision you with Force.com Enterprise Edition.

Managing Users

Your system administrator will need to setup each user of the application and assign them into a user profile. This profile will govern which parts of the application the user can access and the tasks they are able to perform. Profiles are provided for the CloudApps Sustainability Performance Manager and the CloudApps Sustainability Administrator user roles. For further details of the default tasks that can be performed by each of these CloudApps Sustainability profiles see the User Profile Responsibilities and Capabilities in the Appendix.

For further details on setting up and managing users and profiles please review the relevant sections of the online Salesforce Help & Training by clicking on the following hyperlinks:

Managing Users
Managing Profiles

Entering Data

Entering data in CloudApps Sustainability Suite is much like entering data in any web page. You may choose to begin by entering data in any of the major tabs, or by importing your data. The application is a very flexible service that allows you to create, edit, and track data in many ways.

Note the following:

- As you enter and edit data, remember to click **Save** so you don't lose your changes.
- Required fields are marked with a preceding red indicator on editable pages. All other fields are optional and may be left blank.
- If your organisation is enabled for inline editing, you can edit fields directly on the detail page by simply double clicking the field you wish to edit. (i.e. without needing to open a separate edit page).

For further details on entering specific data types (e.g. dates, phone numbers, currency), selecting Picklist Values, Inline Editing or Navigating within the application please review the relevant sections of the online Salesforce Help & Training by clicking on any of the following hyperlinks:

Entering Dates & Times
Entering Currency
Entering Phone Numbers
Selecting Picklist Values
Editing Data Using Inline Editing
Accessing Data
Navigating

Home

The home tab of the application is available to be configured by each organisation to meet their individual requirements. A suggested starting configuration would be to display their chatter feed and a summary of the last dashboard that was viewed. This provides a good starting place for each user each time the application is used as it centralises communication between users of the application and provides an overview of the latest information via the dashboard summary.

Chatter

Chatter is a collaboration application that helps you connect with co-workers inside your CloudApps Sustainability Suite application to share information securely and in real time. Follow other users or follow the data, be kept informed and inform others of what you are working on all from within the app.

Dashboard Summary

The default layout displays the top three graphs from your most recently viewed Dashboard. This area of the screen can be customised for each user. The information contained here can be refreshed at any time by clicking the **Refresh** button.

To change the Dashboard being displayed, click the **Customize Page** link in the right hand corner of the Dashboard panel. Select the Dashboard snapshot you wish to display from the picklist and then click the **Save** button to save your changes and return to the Home page.

Sustainability Administration

For convenience the administration of the CloudApps Sustainability application can primarily be performed from the Administrator Launch Pad. The launch pad has been designed to centralise the most common tasks and processes that are performed by the person(s) fulfilling the Sustainability Administrator role.

The Administrator Launch Pad can be accessed from the **Administration** tab in the main application (this is only visible to users that have been granted the **CloudApps Sustainability Administrator** or **System Administrator** profiles). The launch pad has been divided into five sections. The first section (at the top of the page) contains the general administration tasks that can be performed in any order. The second and third sections outline the inventory management and disclosure reporting processes, showing the sequence of administration tasks required to manage and complete the Disclose stage of the sustainability journey. The fourth and fifth sections outlines the goal alignment and performance management processes, showing the sequence of administration tasks required to establish and maintain the Align stage of the sustainability journey.

Figure 1.1 The Administration Launch Pad

Each of these sections is described in further detail through the remainder of the Sustainability Administration section of this guide.

General Administration

Prior to using the system for the first time the Sustainability Administrator will need to define a number of general application settings. The administrator will also need to establish some key reference data that will then be used across the application. This reference data can be amended and supplemented at any time. It is however advisable to setup all the primary reference data before creating and loading source information in order to streamline this subsequent task.

Application Settings

Applications settings change infrequently. These settings will need to be defined before the application can be fully utilised. The settings are divided into the four sections, described below.

Geocode Settings

Fixed sources can be tagged with a latitude and longitude, which then enables their location to be displayed on a map. The latitude and longitude of the source location can be derived from the postcode entered against each source record. This is an optional feature that is disabled by default. At the customers discretion this feature can be enabled, but it should be noted that this would create a dependency on the 3rd party provider (Google or Yahoo). If this option is enabled the application will pass each postcode recorded against a source out to the selected 3rd party geocode provider. The application will then receive back the appropriate geocode (lat/long) co-ordinates, which are then stored on the source record. Both Google and Yahoo provide a limited free service (typically restricted to a small number of calls). CloudApps cannot guarantee that the provider will always make this free service available. If certainty about on-going provision is required, a licence key can be purchased from either provider to enable access their premium services. Should you wish to make use of this feature the respective organisations should be contacted directly and the licence key they provide entered into the relevant licence key field located below the Geocoding Provider radio buttons.

Period Settings

Goals and Performance Centres both segment their data into Periods (Goal Periods & Performance Periods). Periods need to be set consistently across the application; hence the **Period Basis** parameter defines whether these periods are Fiscal, Calendar or Disclosure periods. The start month for annual Calendar periods is always January but for Fiscal or Disclosure Periods the start month can be set using the **Start Month** parameter. Note that a disclosing year is the equivalent to a regulatory year for disclosing an organisation's carbon footprint. For example in the UK the CRC Energy Efficiency Scheme requires disclosures of one year in duration starting on the first of April. The **Default Period View** parameter is used to define which view is displayed by default after the user clicks on the Performance tab.

Carbon Settings

When assessing Sustainability Initiatives that are 'GHG Reduction Initiatives' it is helpful to see the cost of saving a tonne of carbon against the cost of purchasing an allowance for each tonne of carbon if the reduction were not implemented. To set the current cost of purchasing carbon allowances, enter the value (in the currency

your organisation is using across its implementation) in the **Cost of Carbon Allowances** parameter field.

Source Key Exchange

Source Keys provide a means of tagging source data with 'type' and several levels of sub-type information, with emissions factors for Kyoto Protocol GHG's and also costs. Source Keys must either be created or loaded before any source data can be entered or imported into the application. To help with this process CloudApps maintain an optional central facility for publishing Source Keys containing a broad variety of worldwide greenhouse gas emission factors from several bodies (e.g the US Environmental Protection Agency (EPA), UK Department for Environment Food and Rural Affairs (DEFRA), International Energy Agency (IEA), Intergovernmental Panel on Climate Change (IPCC), Australian Department of Climate Change and Energy Efficiency (DCCEE) and factors from the Canadian National Inventory Report). Before the CloudApps Source Key Exchange can be accessed the Client ID and Client Secret provided by CloudApps to your administrator must be entered. Further security authorisation will be required when first attempting to access the Source Key Exchange. Following successful authentication the Client ID and Client Secret entered here will be used to maintain API access between your implementation of Sustainability Suite and the CloudApps Source Key Exchange.

Remember to click the **Save** button to store your changes.

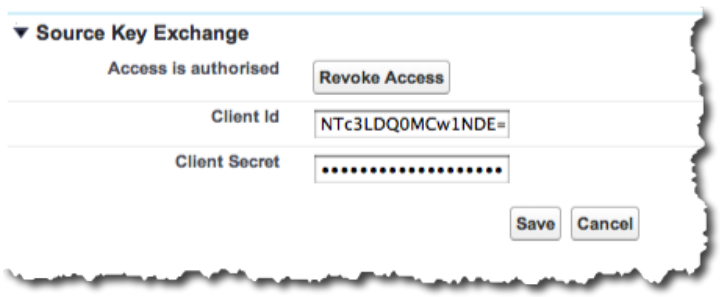


Figure 1.2 General Administration - Application Settings

Defining and Managing Reference Data

Data Sources can be linked to or associated with Providers (e.g. energy providers) and Categories (Geographies, Business Divisions, Facilities, Usage, Assets). Before data sources can be linked to these entities they must first have been defined. Categories are also used for defining the master list of Performance Centre Types. The following section describes the process for establishing and managing this reference data.

Note

Whilst not specifically described here it should also be noted that reference data could be imported into the application via any of the supported interfaces. For further details on the recommended tools and user profile required to import data please review the Data Import Tools & Recommendation section of this User Guide.

Categories

Categories primarily provide a means of categorising data sources. This information is also then inherited by the Source Items created within each Source as well as the inventory balances derived from the Sources. This information is used to segment and report on sources information in both CDP Disclosures and within selected Dashboards and Reports. Making use of categories provides an efficient means of slicing and dicing source information for reporting in various forms. Categories are also additionally used to define Performance Centre Types (used within the Performance area of the application).

Select the **Categories** icon from within the *General Administration* section of the Administration Launch Pad to display the Categories home page with either the most recently viewed, created or modified categories displayed (if there are any). From the Categories home page you can view types of categories by clicking on the **Go** button displayed alongside the View picklist. Views for each of the default categories are provided. Selecting any of these pre-defined views in the view picklist will display a list of the records that have been defined for that category. If you have created additional views you will also be able to select these here.

To view, edit, delete or clone an individual category click on the category name, which is a hyperlink. Performing this action will take you to a detail page for that individual category. This view also contains a related list showing the sources that have this category defined (if any).

There are several ways that you can define a new category. Begin by clicking on the **Categories** icon within the *General Administration* section of the Administration Launch Pad, which will then display the Categories home page.

1. Clicking on the **New** button (in the Recent Categories list) will initiate the process for defining a new category.

2. From any Category view you can click the **New Category** button to initiate the process for defining a new category.

3. When viewing an existing category from the categories details page you can click the **Clone** button. This will create a cloned copy of the currently viewed category, enabling changes to be made and then saved as a new category.

When creating a new category you will be required to pick the category record type. Choose the appropriate record type for the type of category you are creating.

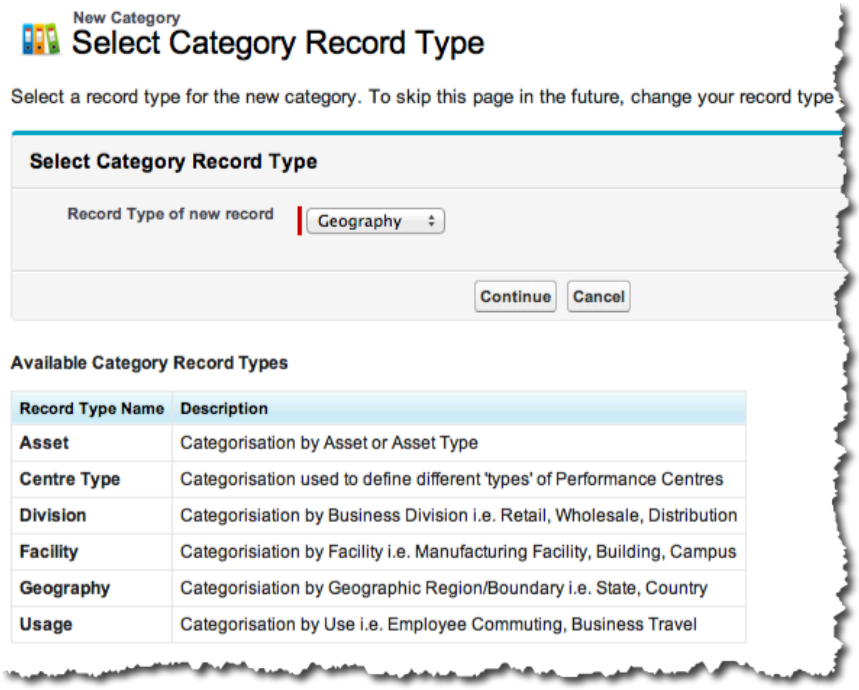

New Category
Select Category Record Type
Select a record type for the new category. To skip this page in the future, change your record type
Select Category Record Type
Record Type of new record
Geography
Continue
Cancel
Available Category Record Types
Record Type Name
Description
Asset
Categorisation by Asset or Asset Type
Centre Type
Categorisation used to define different 'types' of Performance Centres
Division
Categorisiation by Business Division i.e. Retail, Wholesale, Distribution
Facility
Categorisiation by Facility i.e. Manufacturing Facility, Building, Campus
Geography
Categorisiation by Geographic Region/Boundary i.e. State, Country
Usage
Categorisation by Use i.e. Employee Commuting, Business Travel

Figure 1.3 General Administration – Selecting a Category Record Type

The following fields are available when defining new categories, only Category Name is mandatory:

Information

Category Name: Define a name that uniquely identifies this category. This name will appear in CDP Disclosures, reports and dashboards.

Type: Select the type of Category from the picklist provided. Default types are provided for the Usage category only. Geography, Division and Facility are used in CDP Disclosures to report scope 1 and scope 2 emissions. Usage is also used in CDP disclosures to report scope 3 emissions and four pre-defined categories are provided for this purpose (in order to segregate scope 3 transport emissions as required for CDP disclosure reporting). The Asset category type is not required for CDP reporting but is a useful means of categorising emission by asset, typically large pieces of equipment or machinery. Further 'types' can be added to the picklist as required across each of the different categories.

Description: Enter a full description of the category.

The following additional fields are available when defining a new facility:

Supplementary Information (Facility Record Type)

Postal Address (Street Address, Town/City, County/State, Postal/Zip Code, and Country: Enter the full postal address of the facility.

Landlord: Enter the name of the landlord and any other pertinent information (if applicable).

Floor Area: Enter the floor area of the facility.

Number of FTEs: Enter the number of Full Time Equivalent Employees (FTEs) located at this facility.

Occupancy %: Enter the percentage of the facility that is occupied.

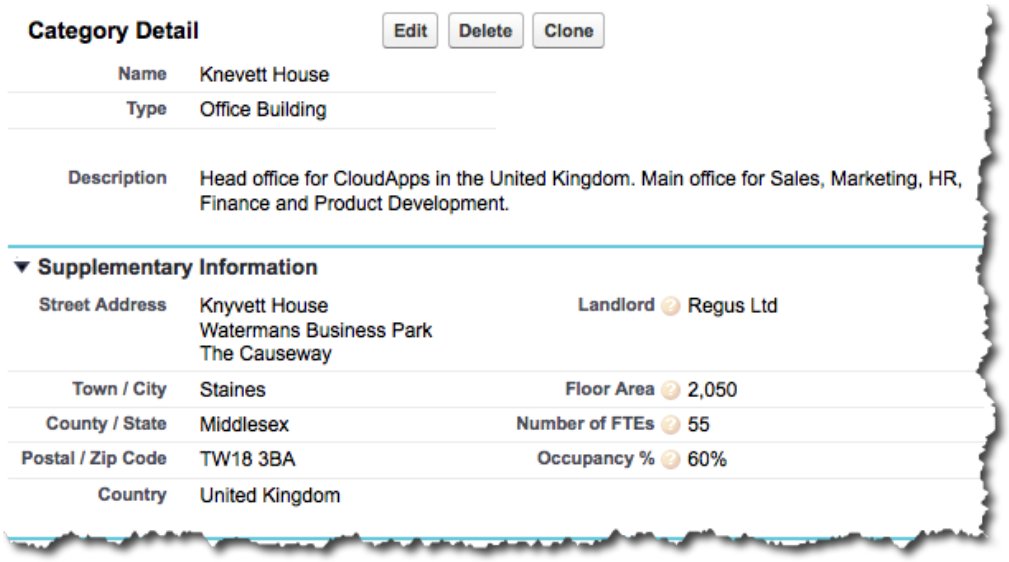


Figure 1.4 General Administration – Categories (Facility Record Type)

Providers (a Party type)

Product/Service Providers (abbreviated to Providers) is a type of Party that is used in CloudApps Sustainability Suite to record the details of the Product or Service Provider associated with a Data Source. Examples include energy providers, fuel providers, providers of transport services or waste disposal service providers.

Click the **Providers** icon from within the *General Administration* section of the Administration Launch Pad to display the Parties home page with either the most recently viewed, created or modified parties displayed (if there are any). Parties are used to manage both external providers and your own organisations divisional or company structure. From the Parties home page you can view lists of parties by clicking on the **Go** button displayed alongside the View picklist. Selecting '**Product/Service Providers**' in the view picklist will display a list of all providers. If you have created additional views you will also be able to select these here.

To view, edit, delete or clone an individual party click on the party name, which is a hyperlink. Performing this action will take you to a detail page for that individual party. This view also allows you to see which sources this party is associated with (if any).

There are several ways that you can define a new Provider. Begin by clicking on the **Providers** icon from within the *General Administration* section of the Administration Launch Pad, which will then display the Parties home page.

1. Clicking on the **New** button (in the Recent Parties list) will initiate the process for defining a new party.

2. From any Party view you can click the **New Party** button to initiate the process for defining a new party.

3. When viewing an existing party from the party details page you can click the **Clone** button. This will create a cloned copy of the currently viewed party, enabling changes to be made and then saved as a new party.

When creating a new party you will be required to pick the party record type. Choose **Product/Service Provider** to create a provider/supplier of products or services for your organisation.

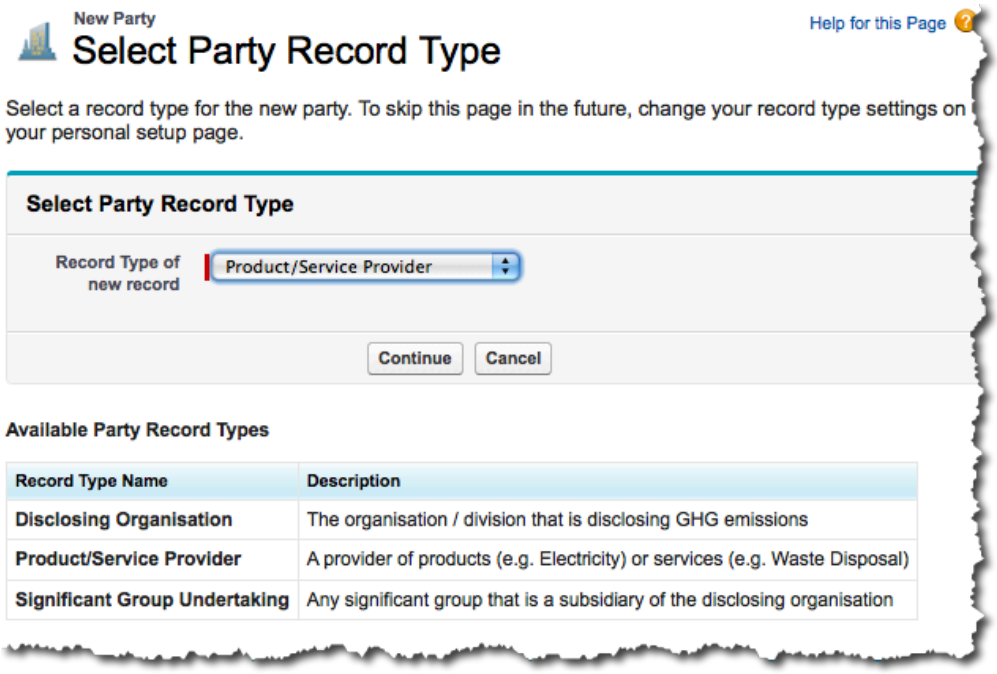

New Party
Select Party Record Type
Help for this Page
Select a record type for the new party. To skip this page in the future, change your record type settings on your personal setup page.
Select Party Record Type
Record Type of new record
Product/Service Provider
Continue
Cancel
Available Party Record Types
Record Type Name
Description
Disclosing Organisation
The organisation / division that is disclosing GHG emissions
Product/Service Provider
A provider of products (e.g. Electricity) or services (e.g. Waste Disposal)
Significant Group Undertaking
Any significant group that is a subsidiary of the disclosing organisation

Figure 1.5 General Administration – Selecting a Party Record Type

The following fields are available when defining new parties (Providers), only Party Name is mandatory:

Party Name: Define a name that uniquely identifies this provider. This name will appear in your reports and dashboards.

Provider Account Number: The account number provided by your product/ service provider used to uniquely identify our organisation.

Postal Address (Street Address, Town/City, County/State, Postal/Zip Code, and Country: Enter the full postal address of the Provider.

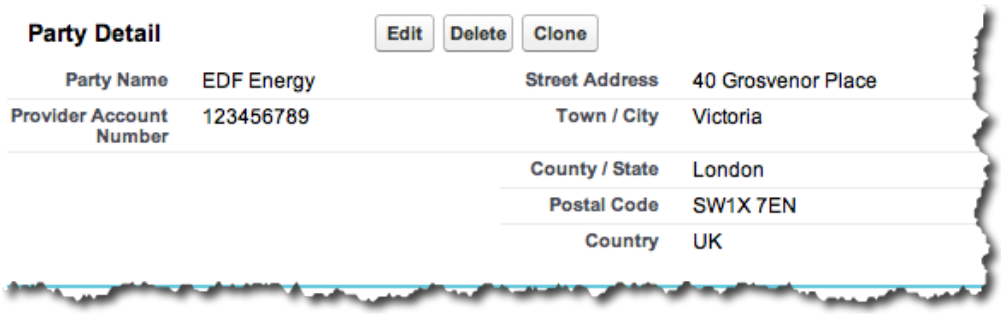


Figure 1.6 General Administration – Providers

Units of Measure

All Source Item data is entered using an appropriate unit of measure. The unit of measure is allocated by the Source Key that has been chosen for the Source Item (see the next section for more details on Source Keys). All units of measure must be defined in advanced before a source key and hence source item can use them.

The application is delivered as standard with many of the most common units of measure pre-defined. The units of measure provided by default within the application are referred to as Standard Units. In addition to standard units the CloudApps Sustainability Administrator can define additional Custom Units that will in turn be used by Custom Source Keys.

Maintaining Custom Units

Organisations wishing to create custom units can do so by clicking the **Create a New Unit** button on the Unit Management home screen. Doing so will open the Unit Edit screen. The information panel on this screen provides detailed guidance for entering the information required to create a custom unit.

In order to ensure that amounts entered for custom units can be converted to an amount specified in the common unit of measure for the unit type a unit rate should be specified. This unit rate will be used to convert amounts specified in the custom unit into amounts specified in the common unit of measure.

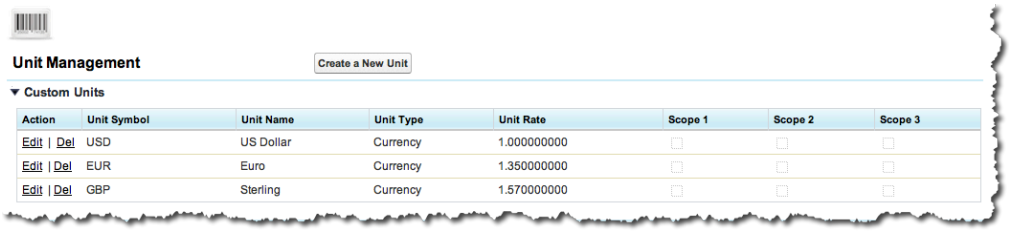


Figure 1.7 General Administration – Custom Unit

Source Keys

CloudApps Sustainability Suite utilises a unique source key to tag source data, reduce errors and simplify the process of calculating GHG emissions from the quantitative information recorded within the application (Amounts on Source Items). By tagging the source data with an appropriate and easy to understand key, CloudApps Sustainability Suite improves reporting & segmentation and helps to ensure that GHG emissions are accurately calculated for all your source data using the correct and most current emissions factors. The application has been designed to work in conjunction with an optional central Source Key Exchange that contains Keys which encompass a broad set of worldwide GHG emission factors from the US Environmental Protection Agency (EPA), UK Department for Environment Food and Rural Affairs (DEFRA), the International Energy Agency (IEA) and the Intergovernmental Panel on Climate Change (IPCC) and other country specific bodies.

CloudApps Sustainability Suite is capable of calculating and storing the emissions factors of four greenhouse gases; carbon dioxide (CO2), methane (CH4), nitrous oxide (N2O), sulphur hexafluoride (SF6) and two groups of gases; hydroflourocarbons (HFCs) and perfluorocarbons (PFCs) as defined in the Kyoto Protocol, which came into force on the 16th February 2005.

In addition to the emission factors themselves the key also includes details of the scope, unit of measure, type (plus three additional levels of sub-typing) and the origin i.e. source of the emission factors. All of this additional information is carried across to each source item that uses the appropriate source key.

Select the **Source Keys** icon from within the *General Administration* section of the Administration Launch Pad to display the Source Keys home page. This will display a list of the Bodies, which collects together a set of keys containing information (including emissions factors) that have been published by that organisation/body.

Click on the name of the Body (which is a hyperlink) to display a list of the keys, supported by the application along with the conversion factors in use for calculating CO2, CH4 CO2e, N2O CO2e, HFCs CO2e, PFCs CO2e, SF6 CO2e and Total GHG CO2e emissions.

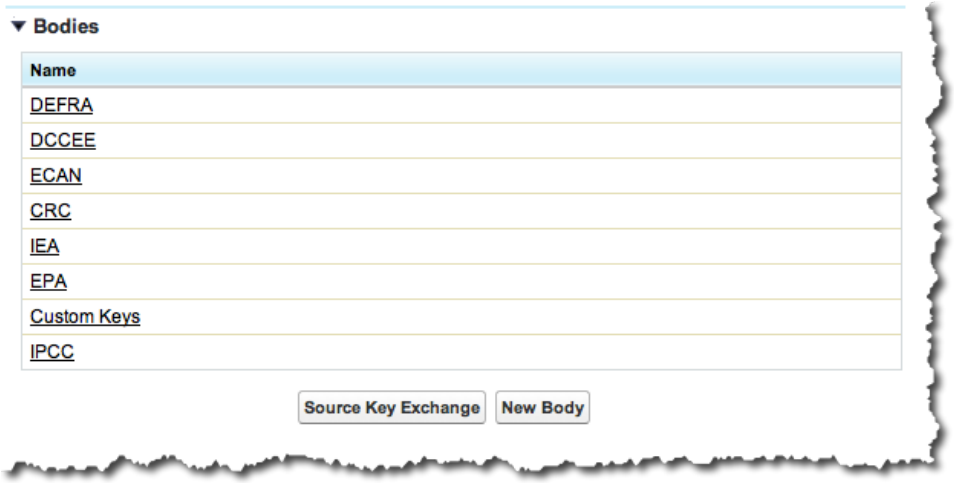


Figure 1.8 General Administration – Bodies

Loading Source Keys (from the Source Key Exchange)

Before you can begin loading source data you must either create your own custom keys or load keys from the central Source Key Exchange that is hosted and maintained by CloudApps. To select and then load keys from the Exchange click on the **Source Key Exchange** button on the main Source Keys page. If this is the first time the Source Key Exchange is to be used you will be required to go through an authentication process to authorise API access between your organisations instance of CloudApps Sustainability Suite and the Source Key Exchange. Once authenticated you will be presented with a list of Source Key Clusters. Keys have been grouped into clusters for ease of installation. The list of available clusters (along with their revision number and installation status) can be refreshed at any time by clicking the **Refresh** button.

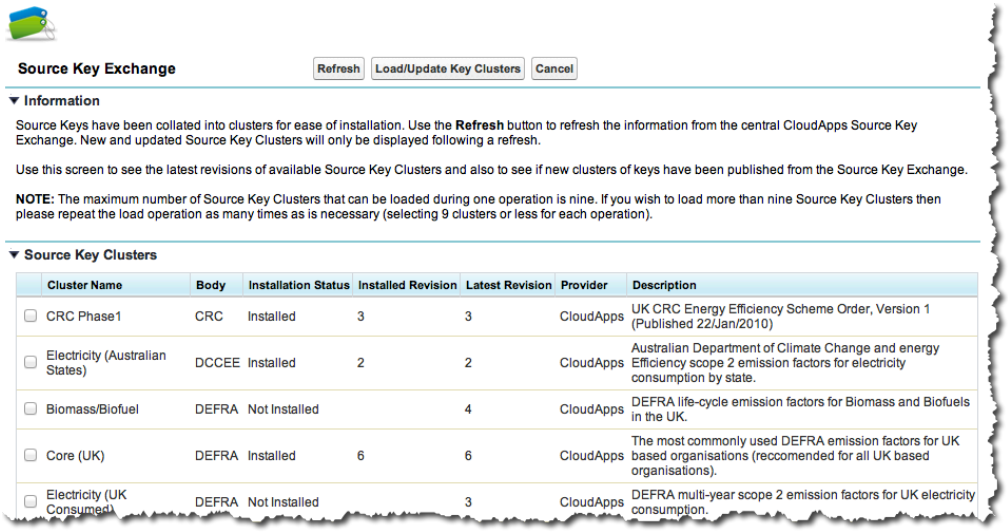

Source Key Exchange
Refresh
Load/Update Key Clusters
Cancel
Information
Source Keys have been collated into clusters for ease of installation. Use the Refresh button to refresh the information from the central CloudApps Source Key Exchange. New and updated Source Key Clusters will only be displayed following a refresh.
Use this screen to see the latest revisions of available Source Key Clusters and also to see if new clusters of keys have been published from the Source Key Exchange.
NOTE: The maximum number of Source Key Clusters that can be loaded during one operation is nine. If you wish to load more than nine Source Key Clusters then please repeat the load operation as many times as is necessary (selecting 9 clusters or less for each operation).
Source Key Clusters
Cluster Name
Body
Installation Status
Installed Revision
Latest Revision
Provider
Description
CRC Phase1
CRC
Installed
3
3
CloudApps
UK CRC Energy Efficiency Scheme Order, Version 1 (Published 22/Jan/2010)
Electricity (Australian States)
DCCEE
Installed
2
2
CloudApps
Australian Department of Climate Change and energy Efficiency scope 2 emission factors for electricity consumption by state.
Biomass/Biofuel
DEFRA
Not Installed
4
CloudApps
DEFRA life-cycle emission factors for Biomass and Biofuels in the UK.
Core (UK)
DEFRA
Installed
6
6
CloudApps
The most commonly used DEFRA emission factors for UK based organisations (reccomended for all UK based organisations).
Electricity (UK Consumed)
DEFRA
Not Installed
3
CloudApps
DEFRA multi-year scope 2 emission factors for UK electricity consumption.

Figure 1.9 General Administration – Source Key Clusters

Select up to nine Source Key Clusters (for each load operation) and then click the **Load/Update Key Clusters** button. The selected clusters will then be loaded from the Source Key Exchange. Once completed you will be presented with a confirmation page, which lists the clusters that have been loaded. Click the **Finish** button to complete the process and return to the main Source Key page.

The following examples use keys containing DEFRA emissions factors, which are most appropriate for UK companies disclosing their carbon emissions. If the source data that is being loaded into the application were meter readings for regular electricity generated from fossil fuels (also referred to as Brown electricity), measured in kilowatt hours, consumed (rather than generated) in 2008 then the appropriate key to use would be **DEFRA-Elect-Brown-kWh-Con-2008**. Another example might be loading consumption details Natural Gas measured in therms on a Gross CV (Calorific Value) basis for which the key is **DEFRA-Fuel-NaturalGas-therm-gross**. A passenger transport (PT) example might be for travel recorded in miles in a large diesel powered car for which an appropriate key would be **DEFRA-PT-Car-mile-Diesel-Large,** or finally travel in an aircraft on a long haul business class flight for which the key is **DEFRA-PT-Air-pkm-Long-Business** (pkm stands for passenger kilometres i.e. the distance each passenger travelled not the distance travelled by the plane and then divided between the number of passengers). Hopefully by now you can see that the key is relatively simple to understand and if used correctly will consistently convert any of the supported conversions into their appropriate GHG emissions.

Unit Cost information can also be entered for each source key. In addition to calculating the GHG emissions for a Source Item record it is also possible to calculate a total estimated cost for the amount entered, provided a unit cost has been defined for the relevant key.

To enter a unit cost, locate the relevant key from the list provided within each Key Body and click the **Edit** hyperlink to enter a value (in the common currency defined for your organisation). Editing a key loaded from the Source Key Exchange will display the following page:

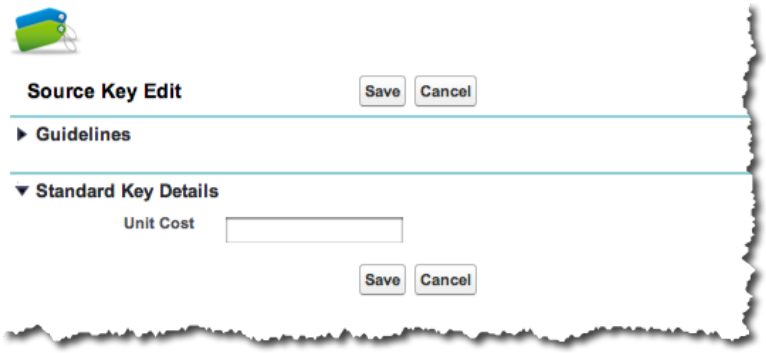


Figure 1.10 General Administration – Source Key Unit Cost

In addition to being able to edit keys it is also possible to delete keys that are not being used. To delete a Source Key drill into the appropriate Key Body to display a list of all Source Keys contained within that body. Within the action column two options are available, [Edit] and [Del]. Clicking the [Del] link will delete the Source Key providing it is not currently in use. If it is in use an error message will be displayed indicating which Source or Sources are using that Source Key.

Maintaining Custom Source Keys

Organisations wishing to create and use their own source keys can do so by defining custom source keys with, if appropriate their own emission factors. Custom Source Keys can either be added to an existing Key Body or a new Body can be created in order to group them together.

To create a new Key Body click the **New Body** button on the Source Keys home page. Once you have named and created a Key Body click the **New Source Key** button to create a new Key along with its corresponding tagging information and emission factors (if appropriate). It is recommended that you follow the same key naming convention as is used for standard keys. Guidelines are provided within the information panel on the Source Keys page when creating a custom Source Key.

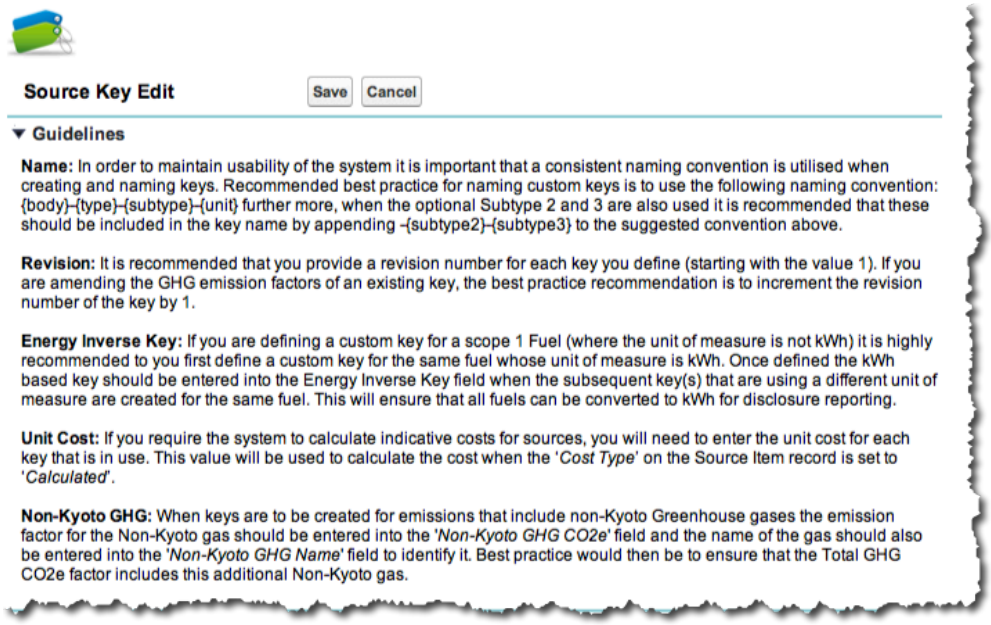
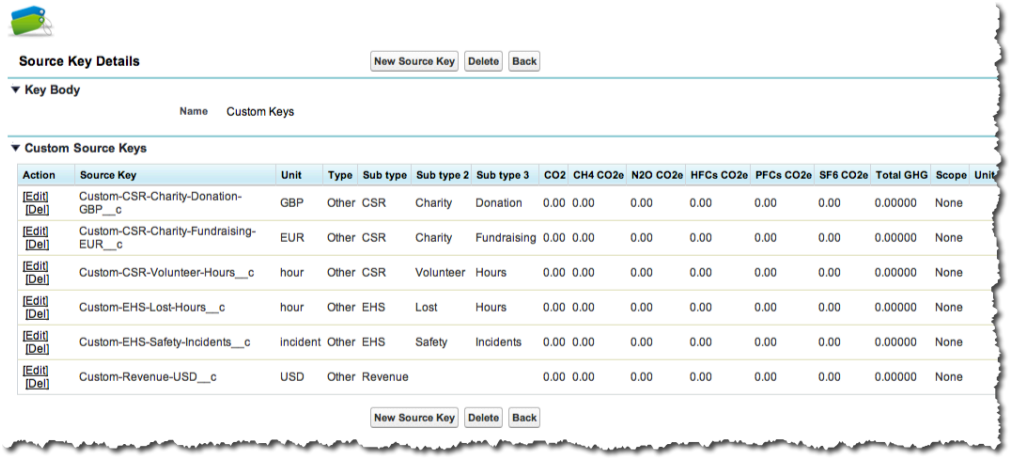

Source Key Edit
Save
Cancel
Guidelines
Name: In order to maintain usability of the system it is important that a consistent naming convention is utilised when creating and naming keys. Recommended best practice for naming custom keys is to use the following naming convention: {body}-{type}-{subtype}-{unit} further more, when the optional Subtype 2 and 3 are also used it is recommended that these should be included in the key name by appending -{subtype2}-{subtype3} to the suggested convention above.
Revision: It is recommended that you provide a revision number for each key you define (starting with the value 1). If you are amending the GHG emission factors of an existing key, the best practice recommendation is to increment the revision number of the key by 1.
Energy Inverse Key: If you are defining a custom key for a scope 1 Fuel (where the unit of measure is not kWh) it is highly recommended to you first define a custom key for the same fuel whose unit of measure is kWh. Once defined the kWh based key should be entered into the Energy Inverse Key field when the subsequent key(s) that are using a different unit of measure are created for the same fuel. This will ensure that all fuels can be converted to kWh for disclosure reporting.
Unit Cost: If you require the system to calculate indicative costs for sources, you will need to enter the unit cost for each key that is in use. This value will be used to calculate the cost when the 'Cost Type' on the Source Item record is set to 'Calculated'.
Non-Kyoto GHG: When keys are to be created for emissions that include non-Kyoto Greenhouse gases the emission factor for the Non-Kyoto gas should be entered into the 'Non-Kyoto GHG CO2e' field and the name of the gas should also be entered into the 'Non-Kyoto GHG Name' field to identify it. Best practice would then be to ensure that the Total GHG CO2e factor includes this additional Non-Kyoto gas.

Figure 1.11 General Administration – Source Key Guidelines

Note that custom keys will be appended with '__c' to identify them as a custom key. When entering your own custom keys onto sources you will need to ensure that the source key name is always appended with the '__c' otherwise it will not be recognised as a valid source key.



Source Key Details — New Source Key | Delete | Back

Key Body

Name: Custom Keys

Custom Source Keys

Action	Source Key	Unit	Type	Sub type	Sub type 2	Sub type 3	CO2	CH4 CO2e	N2O CO2e	HFCs CO2e	PFCs CO2e	SF6 CO2e	Total GHG	Scope	Unit
[Edit] [Del]	Custom-CSR-Charity-Donation-GBP__c	GBP	Other	CSR	Charity	Donation	0.00	0.00	0.00	0.00	0.00	0.00	0.00000	None	
[Edit] [Del]	Custom-CSR-Charity-Fundraising-EUR__c	EUR	Other	CSR	Charity	Fundraising	0.00	0.00	0.00	0.00	0.00	0.00	0.00000	None	
[Edit] [Del]	Custom-CSR-Volunteer-Hours__c	hour	Other	CSR	Volunteer	Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00000	None	
[Edit] [Del]	Custom-EHS-Lost-Hours__c	hour	Other	EHS	Lost	Hours	0.00	0.00	0.00	0.00	0.00	0.00	0.00000	None	
[Edit] [Del]	Custom-EHS-Safety-Incidents__c	incident	Other	EHS	Safety	Incidents	0.00	0.00	0.00	0.00	0.00	0.00	0.00000	None	
[Edit] [Del]	Custom-Revenue-USD__c	USD	Other	Revenue			0.00	0.00	0.00	0.00	0.00	0.00	0.00000	None	

New Source Key | Delete | Back

Figure 1.12 General Administration – Custom Source Key

Just as with standard source keys, unit costs can be entered for custom keys enabling the total cost of source item to be estimated by using the unit cost entered against the relevant key. Custom keys can also be deleted provided they are not in use.

Calculation Engine

During normal operations it should not be necessary to recalculate the GHG emissions that are recorded against the source item records. These are calculated at the time that the source items data is loaded into the application using the GHG Emission Factors contained on the revision of Source Key that is in use at that time.

In most circumstances it is also not necessary to recalculate GHG emissions for previous years when new emission factors are published. However there are occasionally circumstances where emissions from previous years should be recalculated or when Source Keys are updated in order to correct errors.

In order to be able to recalculate source items CloudApps Sustainability Suite provides a mechanism for recalculating the GHG emissions using updated emissions factors. Updated emission factors are made available from time to time via the CloudApps central Source Key Exchange. The CloudApps Sustainability Administrator can see when Keys have been revised by reviewing the revision numbers on the Source Key Clusters screen as described in the previous section.

Once the keys containing updated emission factors have been loaded into your application you will need to determine whether any of the GHG emission factors for your source data need to be recalculated. Please review the relevant documentation from the applicable regulatory body in order to determine if this is necessary. To recalculate GHG emissions click on the **Calculation Engine** icon from within the *General Administration* section of the Administration Launch Pad. From the GHG Emissions Calculation home page click on the

Recalculate GHG Emissions button to perform the recalculation on all source items within the application.

Important

Recalculating GHG Emissions can only be performed by a user with the CloudApps Sustainability Administrator profile.

The console will display the status of this task, which is run in the background. Under normal circumstances the task will initially have a status of *Queued*, then move to *Processing* and finally the status should show as *Completed*. Processing of the task will be split into batches with a running total that displays the number of batches that have completed processing. Successful completion of this task is indicated by a status of *Completed* with no *Failures*. If the task completes with failures you should log a Support Case with CloudApps (via the support website at support.cloudapps.com) in order to determine the cause and impact of the failure.

Inventory Management

Source Data will be processed into specific inventories. CloudApps recommends that prior to loading Source Data the Sustainability Administrator should first define the Inventories and associated infrastructure (Inventory Events, Agreements & Posting Rules) that are required before the inventories can be populated. The logical sequence for performing the required tasks is contained within the *Inventory Management* section of the Administration Launch Pad and as follows:

Inventories

Select the **Inventories** icon from within the *Inventory Management* section of the Administration Launch Pad to display the Inventories home page with either the most recently viewed created or modified inventories displayed (if there are any). A number of the most common Inventories that organisations are likely to require have been pre-defined in the application. From here you can view all inventories by clicking on the **Go** button displayed alongside the View picklist with the 'All' view displayed. If you have created additional views you will also be able to select these here.

To view, edit, delete or clone an individual inventory click on the inventory name, which is a hyperlink. Performing this action will take you to a detail page for that individual inventory.

There are several ways that you can define a new Inventory. Begin by clicking on the **Inventory** icon from within the *Inventory Management* section of the Administration Launch Pad, which will then display the Inventory home page.

1. Clicking on the **New** button (in the Recent Inventories list) will initiate the process for defining a new inventory.

2. From any Inventory view you can click the **New Inventory** button to initiate the process for defining a new inventory.

3. When viewing an existing inventory from the inventory details page you can click the **Clone** button. This will create a cloned copy of the currently viewed inventory, enabling changes to be made and then saved as a new inventory.

The master list of fields available for an Inventory is shown below. The mandatory fields are Inventory Name, Measurement Method, Unit and Sustainability Type.

Information

Inventory Name: Define a name that uniquely identifies the inventory. This is the name that will appear on the Performance Indicators InfoGraphic that is displayed for Performance Centres and in SuMo. It is recommended that you keep the name brief but clear and meaningful (a description field is provided for a more expansive description of the inventory).

Measurement Method: Specify 'Period' for inventories that are principally maintaining periodic consumption data, or 'Cumulative' for inventories that are to be maintained by entering total inventory amounts. The Goal Calculation engine uses this information for calculating the associated performance within periods.

Unit: Use the picklist provided to specify the unit of measure that is to be used for the inventory.

Description: Provide a full description of the Inventory. This full description will be visible to Business and Employee Engagement users to more fully describe the performance indicators that they are being measured against.

Sustainability Type: Use this field to categorise the inventory for one of the 3 main Sustainability types, namely Social, Environmental or Economic. These are also sometime referred to as "People, Planet, Profit or the triple bottom line.

Inventory Type: Use this field to further categorise the inventory. This information is principally used for detailed reporting purposes.

GHG Name: For inventories of GHG emissions use this picklist to select the type of greenhouse gas emissions.

Life-Cycle Emission: For Inventories of GHG emissions this flag is used to indicate that the emissions are life-cycle emissions as opposed to just point in time emissions.

Figure 2.1 Inventory Management – Inventory Detail

Inventory Events

As with Inventories the default application ships with a number of the most common Inventory events pre-defined. Select the **Inventory Event** icon from within the *Inventory Management* section of the Administration Launch Pad to display the Inventory Events home page with either the most recently viewed created or modified inventory events displayed (if there are any). From here you can view all inventory events by clicking on the **Go** button displayed alongside the View picklist with the 'All' view displayed. If you have created additional views you will also be able to select these here.

To view, edit, delete or clone an individual inventory event click on the inventory event name, which is a hyperlink. Performing this action will take you to a detail page for that individual inventory event.

There are several ways that you can define a new Inventory Event. Begin by clicking on the **Inventory Event** icon from within the *Inventory Management* section of the Administration Launch Pad, which will then display the Inventory Events home page.

4. Clicking on the **New** button (in the Recent Inventory Events list) will initiate the process for defining a new inventory event.

5. From any Inventory Event view you can click the **New Inventory Event** button to initiate the process for defining a new inventory event.

6. When viewing an existing inventory event from the inventory event details page you can click the **Clone** button. This will create a cloned copy of the currently viewed inventory event, enabling changes to be made and then saved as a new inventory event.

The only field required and available for an Inventory Event is the Inventory Event Name itself.

Information

Inventory Event Name: Define a name that uniquely identifies your event. Tagging Source Items with Inventory Events is the means of instructing the Posting Engine (via posting rules on Agreements) as to which Inventories it should Source Item data into.

Agreements

The default application includes a number of the most common Agreements pre-defined. Select the **Agreements** icon from within the *Inventory Management* section of the Administration Launch Pad to display the Agreements home page with either the most recently viewed created or modified agreements displayed (if there are any). From here you can view all agreements by clicking on the **Go** button displayed alongside the View picklist with the 'All' view displayed. If you have created additional views you will also be able to select these here.

To view, edit, delete or clone an individual agreement click on the agreement name, which is a hyperlink. Performing this action will take you to a detail page for that individual agreement.

There are several ways that you can define a new agreement. Begin by clicking on the **Agreements** icon from within the *Inventory Management* section of the Administration Launch Pad, which will then display the Agreements home page.

1. Clicking on the **New** button (in the Recent Agreements list) will initiate the process for defining a new agreement.

2. From any Agreement view you can click the **New Agreement** button to initiate the process for defining a new agreement.

3. When viewing an existing agreement from the agreement details page you can click the **Clone** button. This will create a cloned copy of the currently viewed agreement, enabling changes to be made and then saved as a new agreement.

The only field required and available for an Inventory Event is the Agreement Name. Agreements are principally the container for posting rules which will be described next.

Information

Agreement Name: Define a name that uniquely identifies your agreement. This name will be shown when selecting an Agreement to associate with a Source.

Description: Provide a full description of the agreement and it's purpose.

Posting Rules

Each Agreement contains one or more posting rules. These rules control the behaviour of the Posting engine. Each rule will result in an action being performed against a specified inventory. The posting rule specified the action (Posting Action) to be performed and the

event (Inventory Event) that is to trigger that action. If no event is specified then that action will be performed regardless of the event named on the Source Item being posted.

When viewing an Agreement the Posting Rules for that agreement are displayed in a related list below the agreement Details section of the page. From this page an existing posting rule can be edited or deleted (by clicking either the **Edit** or **Del** action link displayed before the posting rule ID) and new posting rules can be created (by clicking the **New Posting Rule** button at the top of the related list). Note that existing Posting Rules can be Edited, Deleted or Cloned by drilling into the appropriate rule and clicking the relevant button.

The required fields are Agreement, Inventory and Posting Action. The complete set of fields is described below.

Information

Posting Rule ID: A unique ID that is automatically generated by the system.

Agreement: The parent Agreement for the posting rule. This field is pre-populated with the name of the parent agreement.

Inventory Event: Select the Inventory Event that will be required to match the Inventory Event on each Source Item as it is processed (posted to the inventory). Leaving this field blank will mean that the posting rule is processed regardless of the Inventory Event named on the Source Item record.

Inventory: The inventory that the posting action will be performed against.

Posting Action: Use the picklist to select the required posting action. Choose between 'Deposit' or 'Withdrawal' actions or specify 'Total' if the amount being posted is a new total amount (and cost if available) for the inventory.

Date From: If a posting rule is only to be acted upon after a certain date, then specify the start date in this field. Leaving the field blank will ensure that the rule is always valid.

Date To: If a posting rule is to be invalidated after a certain date, specify the end date in this field. Leaving the field blank will ensure that the rule is always valid.

Allocation: Leaving this field blank will allocate 100% of the amount and cost from the source Item to the Inventory when the rule is processed. IF only a percentage of the amount and cost is to be allocated to an inventory use this field to specify the percentage required.

Comments: Use this field to provide specific comments related to the posting rule and its intended operation.

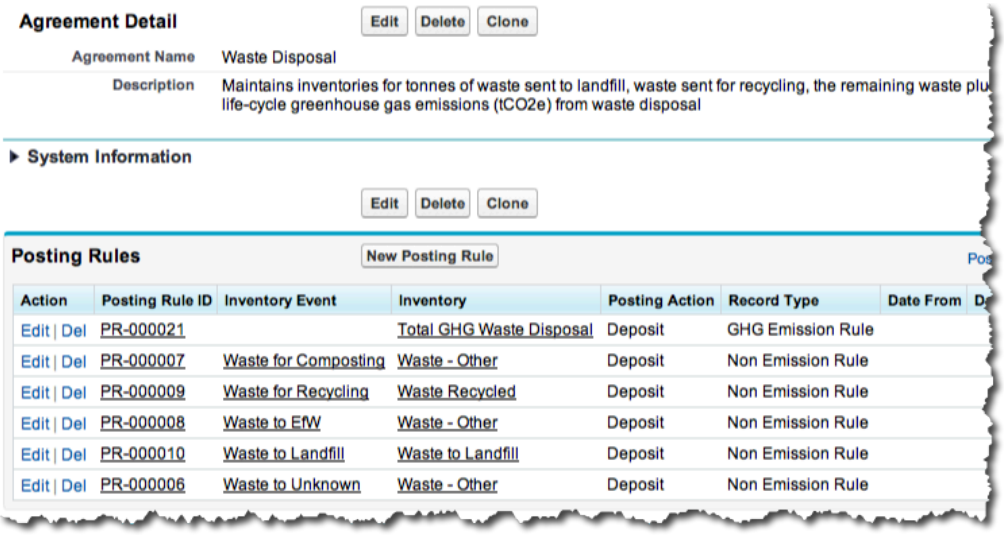


Figure 2.2 Inventory Management – Posting Rules

Sources (Definition)

Click on the **Sources** icon from within the *Inventory Management* section of the Administration Launch Pad to go to the Data Sources home page. *See the Defining a Data Source section of this guide for details on setting-up and defining data sources. This task must be performed by the Sustainability Administrator.*

Data Import Wizard

Click on the **Data Import Wizard** icon from within the *Inventory Management* section of the Administration Launch Pad to launch the Import Wizard. *This task can only be performed by the System Administrator. See the Importing Source Item Data section of this guide for details on importing source data.*

Posting Engine

Once Agreements and Inventories have been established and source item data has been loaded (or manually entered) the Posting Engine can be run. Performing this task will populate and update any inventories with data from new/amended Source Item records, in accordance with the posting rules defined by the agreement associated to the relevant Sources. This process should be re-run periodically after new Source Item data has been loaded or amended. The Posting Engine can be scheduled to run automatically on a frequency which suites your business operations.

The purpose of the posting engine is to maintain the appropriate inventories with period and cumulative balances for both amounts and costs. The posting engine can be run any number of times, as by default it will only post new source item data or source items where the amounts and/or costs have been updated.

To run the posting engine using this default configuration click on the **Posting Engine** icon from within the *Inventory Management* section of the Administration Launch Pad. This will display the home page for the Inventory Posting Engine. To process all new/amended Source Items leave the posting engine options as default then click the **Run Posting Engine** button. The console will display the status of this task, which is run in the background.

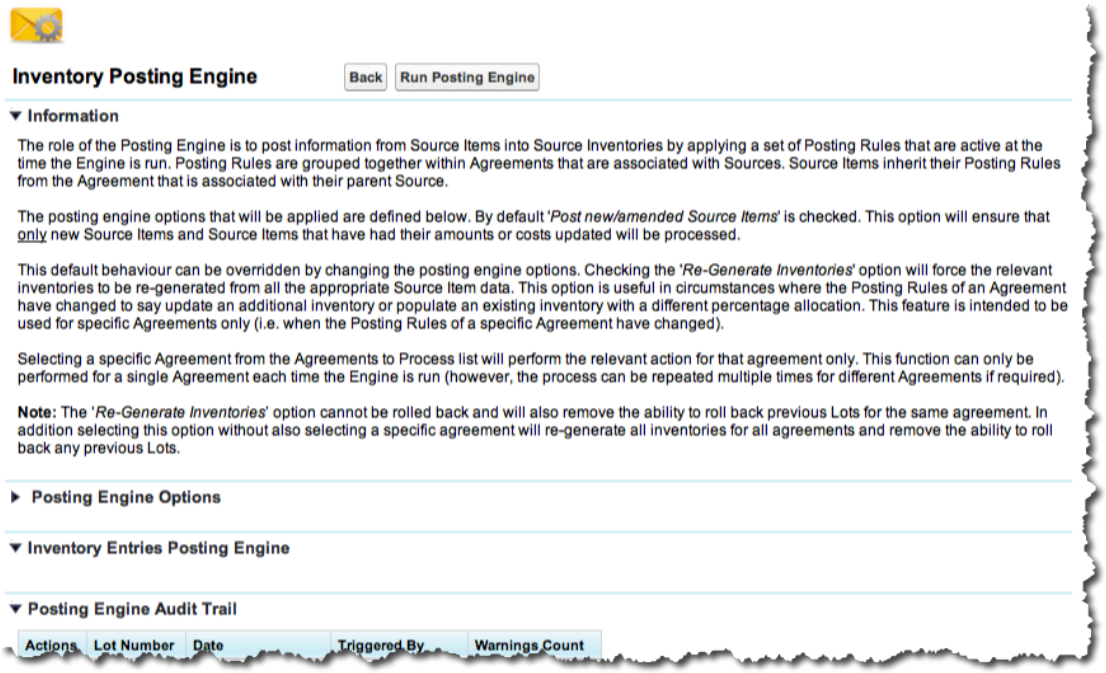

Inventory Posting Engine
Back
Run Posting Engine
Information
The role of the Posting Engine is to post information from Source Items into Source Inventories by applying a set of Posting Rules that are active at the time the Engine is run. Posting Rules are grouped together within Agreements that are associated with Sources. Source Items inherit their Posting Rules from the Agreement that is associated with their parent Source.
The posting engine options that will be applied are defined below. By default 'Post new/amended Source Items' is checked. This option will ensure that only new Source Items and Source Items that have had their amounts or costs updated will be processed.
This default behaviour can be overridden by changing the posting engine options. Checking the 'Re-Generate Inventories' option will force the relevant inventories to be re-generated from all the appropriate Source Item data. This option is useful in circumstances where the Posting Rules of an Agreement have changed to say update an additional inventory or populate an existing inventory with a different percentage allocation. This feature is intended to be used for specific Agreements only (i.e. when the Posting Rules of a specific Agreement have changed).
Selecting a specific Agreement from the Agreements to Process list will perform the relevant action for that agreement only. This function can only be performed for a single Agreement each time the Engine is run (however, the process can be repeated multiple times for different Agreements if required).
Note: The 'Re-Generate Inventories' option cannot be rolled back and will also remove the ability to roll back previous Lots for the same agreement. In addition selecting this option without also selecting a specific agreement will re-generate all inventories for all agreements and remove the ability to roll back any previous Lots.
Posting Engine Options
Inventory Entries Posting Engine
Posting Engine Audit Trail
Actions
Lot Number
Date
Triggered By
Warnings Count

Figure 2.3 Inventory Management – Posting Engine

Under normal circumstances you will see the engine job initially with a status of *Queued*, then move to *Processing* and finally the status should show as *Completed*. Processing of the job will be split into batches with a running total that displays the number of batches that have completed processing. Successful completion of the job is indicated by a status of *Completed* with no *Failures*. If the job completes with failures you should log a Case with CloudApps (via the support website at support.cloudapps.com) in order to determine the cause and implications of the failure.

Posting Engine Options

Several options are available for running the posting engine. In addition to running the engine for all new/amended Source Item Data the engine can be run for just those Sources that use a specific agreement. To run the engine for a specific agreement only expand the **Posting Engine Options** section of the page, highlight the required Agreement and then click the **Run Posting Engine** button. As before the console will then display the status of this task, which is run in the background.

It is also possible to re-generate either just the inventories referenced by a specific agreement or all inventories. An example of where this may be required is when an agreement has been updated to include posting rules for posting to a new inventory. In order to force all the Source Items to be re-processed to both their original inventories and the new inventory this option can be used. To perform this operation, check the **Re-Generate Inventories** checkbox and if required highlight a specific Agreement in the **Select Agreements to Process** list. Then run the posting engine as before by clicking the **Run Posting Engine** button. Care should be taken to ensure that this option is used for specific agreements rather than for all inventories.

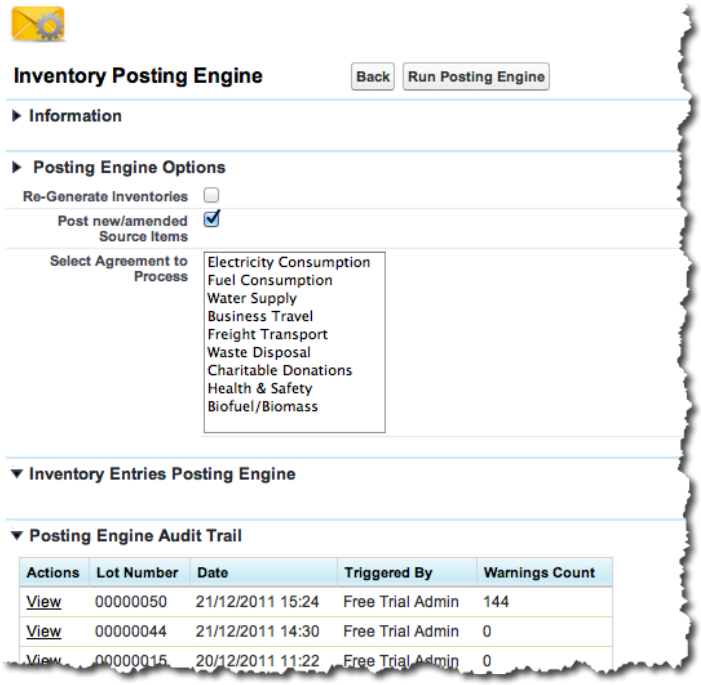


Figure 2.4 Inventory Management – Posting Engine Options (and Audit Trail)

Posting Engine Audit Trail

If the posting engine detects conditions that require the attention of the Sustainability Administrator these will be recorded as warnings in the Audit trail.

Each time the posting engine is run an audit log entry with a specific '***Lot***' number is created. The Audit trail is shown at the bottom of the page Inventory Posting Engine home page. This table will indicate if any warning messages were generated. Click on the **view** action hyperlink for the relevant job's Lot Number to view the warnings.

The audit trail also provides the ability to roll back the changes that have been made during a specific run of the posting engine. To rollback a specific *Lot* click the **view** action link and then click the **Rollback Inventory Entries** button. This will queue a rollback job, the status and progress of which can be viewed on the page.

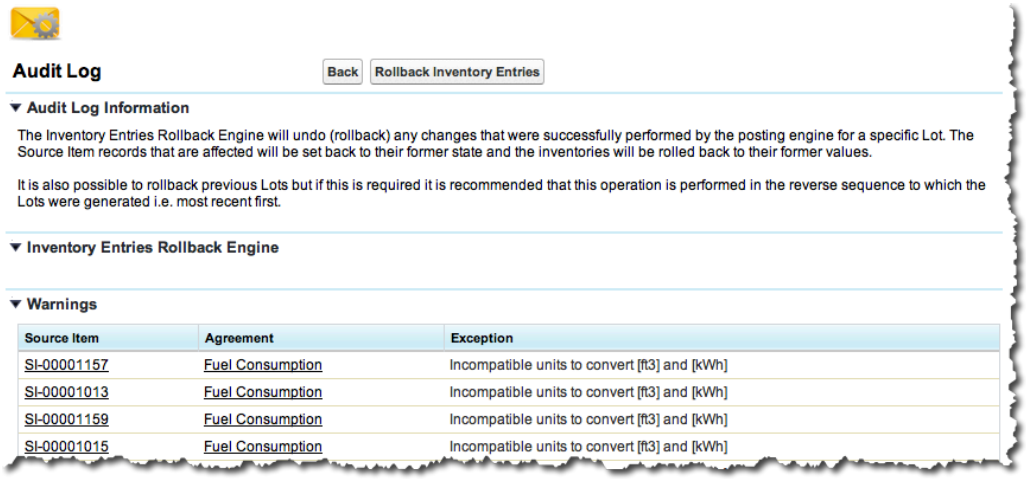

Audit Log
Back
Rollback Inventory Entries
Audit Log Information
The Inventory Entries Rollback Engine will undo (rollback) any changes that were successfully performed by the posting engine for a specific Lot. The Source Item records that are affected will be set back to their former state and the inventories will be rolled back to their former values.
It is also possible to rollback previous Lots but if this is required it is recommended that this operation is performed in the reverse sequence to which the Lots were generated i.e. most recent first.
Inventory Entries Rollback Engine
Warnings
Source Item
Agreement
Exception
SI-00001157
Fuel Consumption
Incompatible units to convert [ft3] and [kWh]
SI-00001013
Fuel Consumption
Incompatible units to convert [ft3] and [kWh]
SI-00001159
Fuel Consumption
Incompatible units to convert [ft3] and [kWh]
SI-00001015
Fuel Consumption
Incompatible units to convert [ft3] and [kWh]

Figure 2.5 Inventory Management – Posting Engine Audit Log (plus Rollback Engine)

Disclosure Reporting

Prior to using the application to create an Information Disclosure the Sustainability Administrator will need to perform a number of additional administration tasks, described below.

Disclosing Organisation and SGU's (Party types)

Details of your own organisation's structure, subsidiary companies and certification schemes are often necessary for statutory and voluntary GHG emission disclosures. CloudApps Sustainability Suite allows you to define your organisation structure as a party record type. This information is a necessary pre-requisite for producing information disclosures. For more details on information disclosures see the Information Disclosures section of this User Guide.

Select the **Disclosing Organisation** icon from within the *Disclosure Reporting* section of the Administration Launch Pad to display the Parties home page with either the most recently viewed created or modified parties displayed (if there are any). From the Parties home page you can view any party types by clicking on the **Go** button displayed alongside the View picklist. Select '**Disclosing Organisations / SGU's**' in the view picklist to display all Disclosing Organisations and Significant Group Undertaking party types. If you have created additional views you will also be able to select these here.

To view, edit, delete or clone an individual party click on the party name, which is a hyperlink. Performing this action will take you to a detail page for that individual party.

There are several ways that you can define a new Disclosing Organisation or SGU. Begin by clicking on the **Disclosing Organisation** icon from within the *Disclosure Reporting* section of the Administration Launch Pad, which will then display the Parties home page.

1. Clicking on the **New** button (in the Recent Parties list) will initiate the process for defining a new party.

2. From any Party view you can click the **New Party** button to initiate the process for defining a new party.

3. When viewing an existing party from the party details page you can click the **Clone** button. This will create a cloned copy of the currently viewed party, enabling changes to be made and then saved as a new party.

When creating a new party you will be required to pick the party record type. Choose either **Disclosing Organisation** to define your top-level organisation that will be responsible for disclosing GHG emissions information, or **Significant Group Undertaking** for a significant group or subsidiary of the disclosing organisation. SGU's only need to be defined if you wish to aggregate disclosure information for that part of the organisation within the overall information disclosure. Depending on which party record type you have chosen to create will govern the fields available for entry. The master list of fields available for a Disclosing Organisation is shown below. Only Party Name is mandatory:

Information

Party Name: Define a name that uniquely identifies your organisation or the company/department within the organisation.

Postal Address (Street Address, Town/City, County/State, Postal /Zip Code, and Country: Enter the full postal address in the relevant fields.

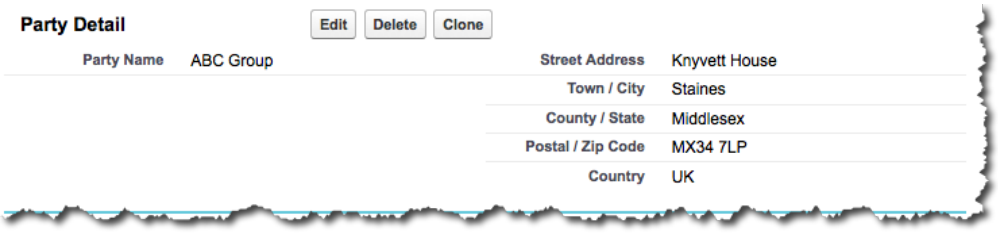


Figure 3.1 Disclosure Reporting – Disclosing Organisation (Information)

Supplementary Information

Boundary: Select the organisational boundary that the organisation belongs within. This will be relevant when calculating goal performance as each goal uses a boundary to ensure that comparisons across periods are consistent. E.g. if a goal is being compared against a base period from a time before a particular division was acquired then the boundary being used on the goal should not include that division thus ensuring that current performance against the base period does not include sources associated to the new division.

Boundary Type: This is a display only field, which shows the type of boundary that the organisation is associated with.

Equity Share: There are four types of boundary that can be defined. If the boundary is defined as Equity share then the percentage entered in this field will be applied to all calculations of amounts by the Goal Baseline and Calculation engines. This is to ensure that where companies and divisions are party owned only the emissions and amounts related to the organisations percentage ownership are calculated.

CRC Registration Number: Enter the registration number generated by the UK Environment Agency for organisations that are participating in the CRC Energy Efficiency Scheme.

Certification Scheme Details

Certification Scheme Number: UK CRC Disclosures have early action metrics based on participation in the Carbon Trust Standard (and equivalent) certification scheme. If the organisation participates in one of these schemes select the name of the scheme from the picklist provided.

Scheme license number: Enter the licence number provided by the scheme organiser.

Scheme awarded: Enter the date from which certification has been awarded.

Scheme valid until: Enter the date that the scheme is valid until.

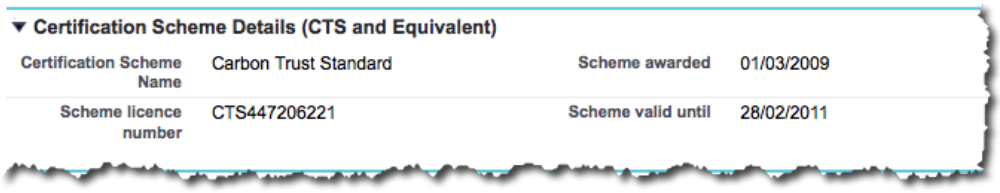


Figure 3.2 Disclosure Reporting – Disclosing Organisation (Certification Scheme Details)

Disclosure Definitions

Disclosure Definitions define the primary criteria used when creating individual information disclosures. A disclosure definition can be used for multiple disclosures, thus ensuring consistency. The criteria defined in a disclosure definition are centred on the emissions, scope, type and keys in addition to the countries that will be included in the disclosure. This information is a necessary pre-requisite for producing information disclosures. Two predefined Disclosure Definitions are provided by default in the application. These are the best practice disclosure definition for a UK CRC Energy Efficiency Scheme disclosure and an example Carbon Disclosure Project disclosure (which will need to be edited before it can be used). In addition to creating new disclosure definitions these pre-defined definitions should be amended or cloned as required. For more details on information disclosures see the Information Disclosures section of this User Guide.

Select the **Disclosure Definitions** icon from within the *Disclosure Reporting* section of the Administration Launch Pad to display the Disclosure Definitions home page with either the most recently viewed created or modified disclosure definitions displayed (if there are any). From the Disclosure Definitions home page you can view all disclosure definitions by selecting 'All' in the View picklist and clicking on the **Go** button. If you have created additional views you will also be able to select these here.

To view, edit, delete or clone an individual disclosure definition click on the disclosure definition name, which is a hyperlink. Performing this action will take you to a detail page for that individual disclosure definition.

There are several ways that you can define a new Disclosure Definition. Begin by clicking on the **Disclosure Definition** icon from within the *Disclosure Reporting* section of the Administration Launch Pad, which will then display the Disclosure Definitions home page.

1. Clicking on the **New** button (in the Recent Parties list) will initiate the process for defining a new disclosure definition.

2. From any Disclosure Definition view you can click the **New Disclosure Definition** button to initiate the process for defining a new disclosure definition.

Performing any of these actions will initiate the wizard for creating a Disclosure Definition. Follow this process to create a Disclosure Definition (outlined below): Each of the steps for defining the disclosure definition is cover below:

First Step: Give the disclosure definition a unique name and then select the Emissions Factor Bodies (of the sources to be included in the disclosure) that are being used to calculate GHG emissions. Next select the countries (using their 2 digit ISO country code) of the sources that you wish to be included in the disclosure definition criteria.

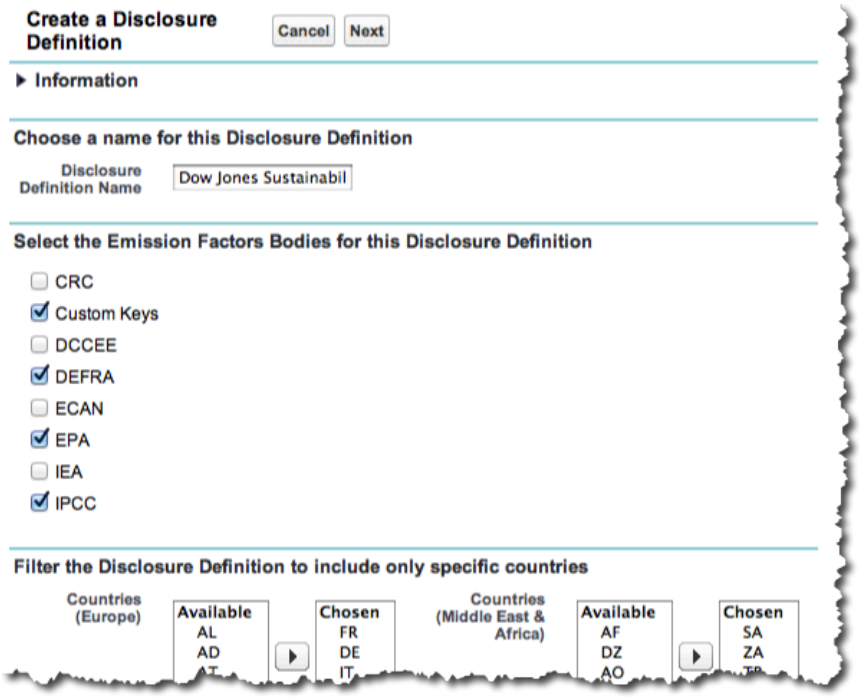


Figure 3.3 Disclosure Reporting - First step: Disclosure Definition Wizard (Selecting Emission Factor Bodies and Countries)

Second Step: Select the Scopes that will be used to filter the 'Types' of emissions that are included in the disclosure definition criteria. These selections can be overridden in the next step of the process when you will be provided the opportunity to select the individual types themselves.

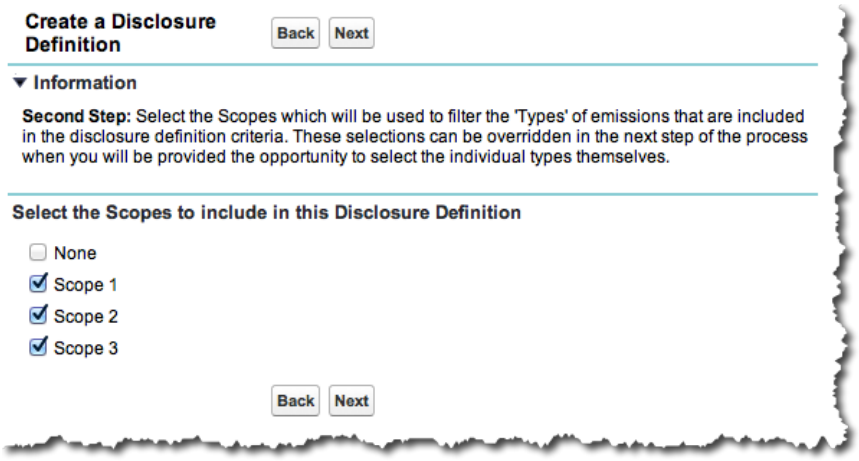

Create a Disclosure Definition
Back
Next
Information
Second Step: Select the Scopes which will be used to filter the 'Types' of emissions that are included in the disclosure definition criteria. These selections can be overridden in the next step of the process when you will be provided the opportunity to select the individual types themselves.
Select the Scopes to include in this Disclosure Definition
None
Scope 1
Scope 2
Scope 3
Back
Next

Figure 3.4 Disclosure Reporting - Second step: Disclosure Definition Wizard (Selecting the Scopes to include)

Third Step: Select the types of emissions which are to be included in the disclosure definition criteria. The scope selections made in the previous step will govern which 'Types' have been pre-selected for this step. Only types that are contained within the Emissions Factor Bodies (selected in the first step) will now be displayed. For CRC Disclosure Definitions only you are required to enter the most current DEFRA grid rolling average emissions factor for consumed electricity (aka Brown electricity).

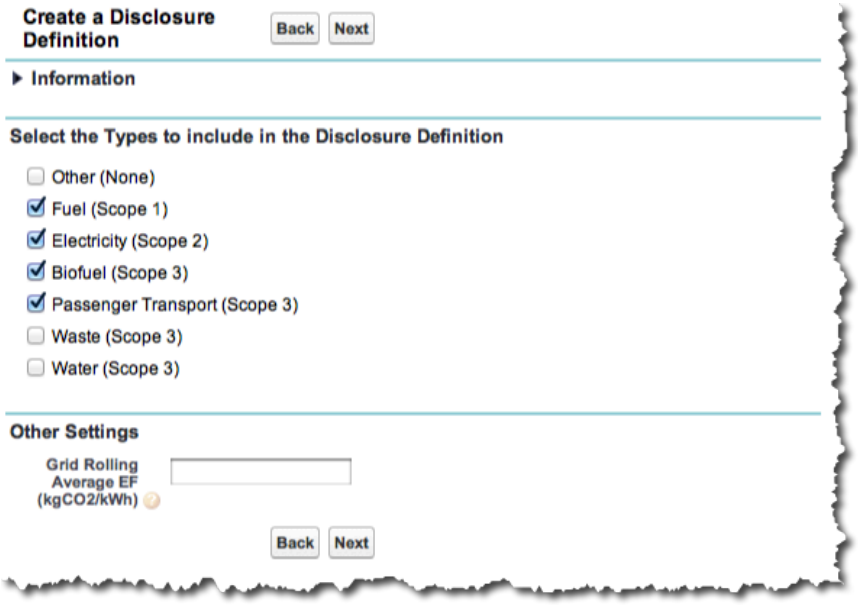


Figure 3.5 Disclosure Reporting - Third step: Disclosure Definition Wizard (Selecting the Types to include)

Fourth Step: The selections that you have made are summarised at this stage. You can now optionally add individual GHG Emissions Factor Keys (for types that were not selected) or Omit individual keys (from within types that were selected). In order to perform either of these actions select the appropriate button (**Add EF Keys** or **Omit EF Keys**) and on the subsequent screen place a check mark against each of the EF Keys that are to be added or omitted. Once you have made all your optional selections, save your changes to return to this screen.

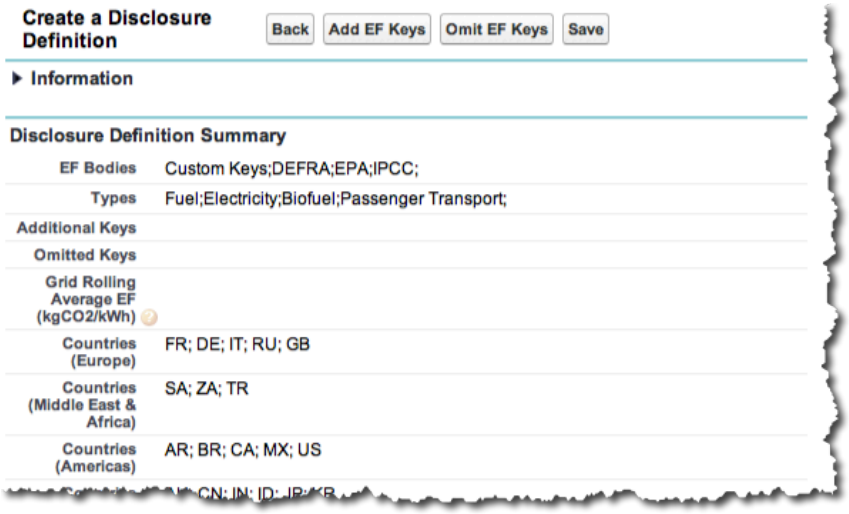


Figure 3.6 Disclosure Reporting - Fourth step: Disclosure Definition Wizard (Summary page with access to Add/Omit EF Keys)

Once you have completed defining your disclosure criteria, click the **Save** button to complete the Wizard process and save the disclosure definition.

Disclosures (Definition & Calculation)

See the Information Disclosures section of this guide for details defining and calculating Disclosures. This task should be performed by the Sustainability Administrator.

Dashboards

Click on the **Dashboards** icon from within the *Disclosure Reporting* section of the Administration Launch Pad to see the most recently viewed Dashboard then select either the CDP or CRC Emissions Disclosures dashboard from the **View Dashboard** pull down as required. Click on the name of Disclosure Dashboard hyperlink to view the disclosure dashboard. *See the Dashboards and Reports section of this guide for further details on viewing and modifying Dashboards.*

Goal Alignment Process

Establishing Sustainability Goals provides the ability to measure actual performance and to predict expected performance within the current period organisation wide. Goals also provide a means for defining budgets and targets into the future, which should they be achieved would ensure attainment of the goal. Lastly goals provide the means to allocate out those budgets/targets across the organisation to managers and employees so as to align the whole organisation (i.e. it's performance centres and employees) behind the achievement of the goal.

In order to use the Goals capability the Sustainability Administrator will need to first create the relevant Boundary, define the Goal, the period of time it is to be measured over, set the appropriate budgets/targets for each period and specify which performance centres these are to be allocated out to. Once these tasks have been completed the Administrator is ready to run the Goal processing engine to calculate the baseline amount, allocate budgets/targets and finally to calculate period totals. Each of these steps and operations is described in this section (below).

Boundaries

Boundaries provide the means of ring fencing a set of sources. Boundaries are important when measuring the performance of goals over time (i.e. across multiple periods) in order to ensure a like-for-like comparison. If the objective of a goal is to reduce the use of a resource to 25% below the use of the resource 10 years earlier it is important that the same boundary was being applied then as it is now. Boundaries provide the mechanism for ensuring that this happens.

Before defining a new boundary the Disclosing Organisations and SGU's that it is to contain must first have been created. See the section Disclosing Organisations and SGU's earlier in the guide for details of how to create these party types.

Select the **Boundaries** icon from within the *Goal Alignment Process* section of the Administration Launch Pad to display the Boundaries home page with either the most recently viewed created or modified boundaries displayed (if there are any). To view, edit, delete or clone an individual boundary click on the boundary name, which is a hyperlink. Performing this action will take you to a detail page for that individual boundary.

There are several ways that you can define a new Boundary.

1. Clicking on the **New** button (in the Recent Boundaries list) will initiate the process for defining a new boundary.

2. From any Boundary view you can click the **New Boundary** button to initiate the process for defining a new boundary.

3. When viewing an existing boundary from the boundary details page you can click the **Clone** button. This will create a cloned copy of the currently viewed boundary, enabling changes to be made and then saved as a new boundary.

The fields that need to be entered for a Boundary are shown below. Only Boundary Name is mandatory:

Information

Boundary Name: Define a name that uniquely identifies the organisational boundary.

Boundary Type: Use the picklist provided to specify the type of boundary. Financial Control, Operational Control and the Equity Share boundary types are based on the GHG Protocol. CCRF recommends that emissions should be reported using the same boundary as consolidated financial reporting.

Vision: Use this field to describe the sustainability vision for the organisational boundary. This information will be visible to all users of the Sustainability Momentum (SuMo) application.

Once a boundary has been defined the Disclosing Organisation(s) and SGU's (party records) that it is to contain will need to be updated. The Boundary field on the party record should be updated to contain the name of the newly created boundary. If the boundary type has been defined as '*Equity Share*' then the **Equity Share** field should also be populated with a value to indicate the percentage equity share that is to be used in calculations.

Goals (Definition)

Click on the **Goals** icon from within the *Goal Alignment Process* section of the Administration Launch Pad to go to the goals home page. *See the Defining a Goal section of this guide for details on setting-up and defining goals. This task must be performed by the Sustainability Administrator.*

Goal Allocation

The goal allocation process assigns budget/target amounts into the Performance Centre (business structure) of your organisation. Combined with Source Allocations this approach allows for the relevant business owners to see their performance against the indicators that they have impact and control over.

Once the performance centres your organisation intends to monitor and manage have been established you are ready to allocate budgets/targets (or a percentage subset) into one or more performance centres. The percentages to be allocated are specified by defining Goal Allocations. These budgets/targets from goals can be allocated to performance centres one goal to one performance centre or one goal to multiple performance centres. Click on the **Goal Allocation** icon from within the *Goal Alignment Process* section of the Administration Launch Pad to go to the goals home page and then locate and select the individual goal that you wish to allocate from.

The summary page for each goal displays a related list of the Goal Allocations that have currently been defined. Each Goal Allocation will therefore result in a budget/target being allocated to the Performance Indicator for the Inventory on which the Goal is based.

Goal Allocation to Individual Performance Centres

To allocate to one performance centre click the **New Goal Allocation** button in the Goal Allocations section of the goal summary or goal details page (for instructions on allocating one source to multiple performance centres click here). For single performance centre allocations you will be presented with a data input screen that allows an individual performance centre to be selected along with the allocation percentage you wish to allocate.

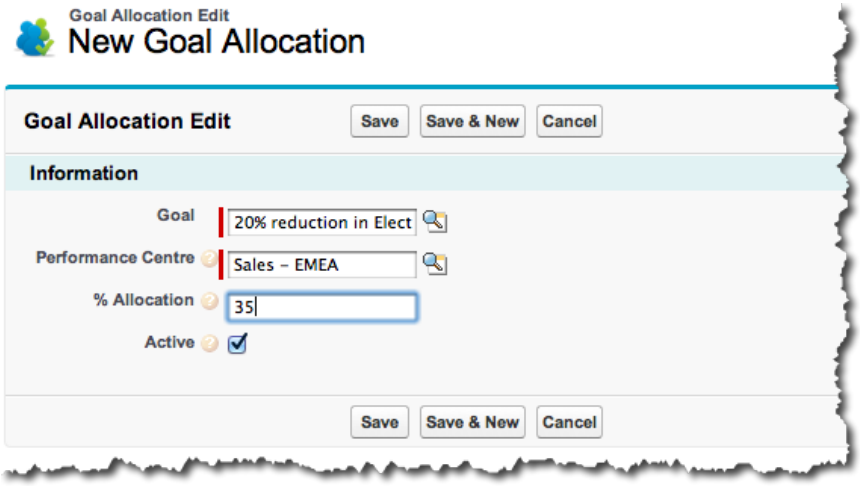


Figure 4.1 Goal Alignment Process - Allocating Budgets/targets from a Goal into a Single Performance Centre

The following fields are displayed and available for entry when creating a goal allocation for a single performance centre:

Information

Goal: The Goal name will be entered by default. Only override this here if you wish to allocate a performance centre to a different goal.

Performance Centre: Click the search icon next to the field in order to select the performance centre that you would like to allocate into.

% Allocation: Enter the percentage of the budget/target that you wish to allocate into the performance centre.

Active: Check this box to activate the source allocation. Only active allocations will be executed by the goal allocation engine.

Repeat this step for as many performance centres as you wish to allocate into from this goal.

Goal Allocation into Multiple Performance Centres

To allocate budgets/targets from one goal into multiple performance centres click the **Multi Allocate** button on the goal detail page. You will then be presented with a data input screen containing three search fields that can be used in conjunction with one another to search for a subset of performance centres to allocate into. Enter a search specification combination into these fields and click the **Search** button to retrieve the performance centres that meet the search specification combination that was entered. Having retrieved the matching performance centres you are now able to enter the allocation information (as described above) for each of the retrieved centres.

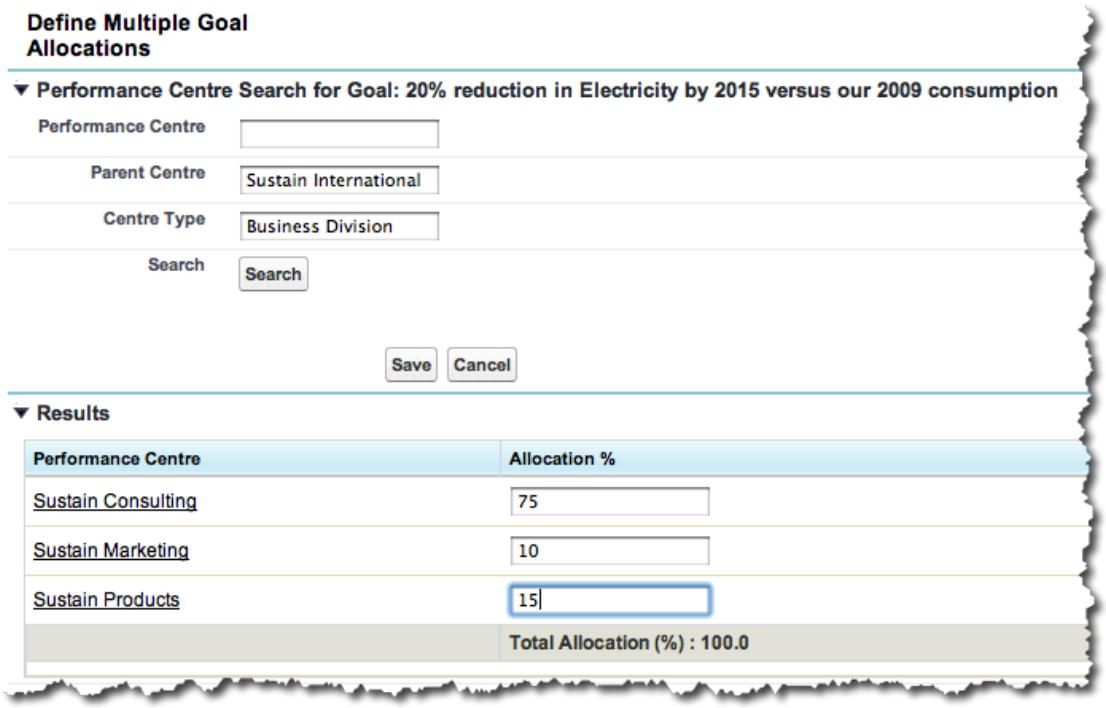


Figure 4.2 Goal Alignment Process - Allocating Budgets/targets from a Goal into Multiple Performance Centres

Goal (Processing) Engine

The goal processing engine has three functions. Once a goal has been defined the processing engine provides the ability to calculate the baseline performance against which most goals will be compared/measured. Performing this function populates the goal with period totals from the baseline period along with any intensity unit values if KPI's are being used. The second function is to allocate budgets/targets into performance centres once these budgets/targets have been defined for the relevant goal periods. The third and final function of the processing engine is to calculate the period totals from the relevant inventories. This final processing task is the one that is likely to be repeated most often and can also be scheduled for automatic execution.

Each of these jobs is queued (regardless of whether they initiated manually or via the scheduling service). Under normal circumstances the job will initially have a status of *Queued*, then move to *Processing* and finally the status should show as *Completed*. Processing of the jobs will be split into batches with a running total that displays the number of batches that have completed processing (if initiated manually from the UI). Successful completion of these jobs is indicated by a status of *Completed* with no *Failures*. If the task completes with failures you should log a Case with CloudApps (via the support website at support.cloudapps.com) in order to determine the cause and implications of the failure.

Baseline Calculation

Prior to calculating the baseline amounts (and if applicable intensity value), one of the goal periods must be flagged as being the base period. See the Updating Goal Periods section for details on how to perform this operation. Once a period has been flagged as the base period you are ready to populate the goal with the period total from the base period.

Click the **Goal Engine** icon from within the *Goal Alignment Process* section of the Administration Launch Pad. From the subsequent Goal Processing Engine page click on the **Baseline Calculation** button. The task will be queued and the console will display the status of the task, which is run in the background. Once complete the **Baseline Amount (Absolute)** and the **Baseline Intensity Value** fields on each Goal will have been updated with the appropriate data from the flagged baseline period. This information is calculated from the appropriate inventories applying the Boundary that has been defined.

Allocate Budgets/Targets

Once budgets/targets for goal periods have been specified and goal allocations have been defined you are ready to allocate the budgets/targets from goals into performance centres. Performing this task will populate the appropriate performance indicators with a budget/target. The process will allocate the specified percentage of the budget/target into the performance indicator that is linked to the same inventory as the goal. This operation will be performed for each performance centre defined in a goal allocation across all goals (provided the goal allocation is flagged as being active).

Click the **Goal Engine** icon from within the *Goal Alignment Process* section of the Administration Launch Pad. From the subsequent Goal Processing Engine page click on the **Allocate Budgets/Targets** button. The task will be queued and the console will display the status of the task, which is run in the background.

Calculate Period Totals

This operation will calculate the actual period totals for all periods and all goals within the specified boundary. This operation should be performed when performance against a goal is being reviewed provided data has been loaded and processed into the relevant inventories since the last time the period totals we calculated.

Click the **Goal Engine** icon from within the *Goal Alignment Process* section of the Administration Launch Pad. From the subsequent Goal Processing Engine page click on the **Calculate Period Totals** button. The task will be queued and the console will display the status of the task, which is run in the background. Once complete the **Amount (Absolute)** field on each Goal Period will have been updated with the appropriate data calculated from the appropriate inventories applying the Boundary that has been defined. Many of the other fields on the goal period are then re-calculated based on the updated absolute amount i.e. the **Projected Amount**, **Actual Amount** (with intensity KPI applied), and a number of percentage and variance fields.

Performance Management

Before standard Business users can use the application to view and manage their Sustainability Performance Indicators the Sustainability Administrator will need to create the relevant Performance Centres, define which data sources (and hence inventory data) are to be allocated into those centres and also define which indicators each type of centre should see and then run the allocation engine to actually calculate performance. The Performance Centres that have been defined by the Sustainability Administrator will then be populated with performance indicators segmented into performance periods. Budgets/targets for each of the performance indicators can also be automatically allocated using the Goal Allocation process described in the previous section.

Centre Types (a Category record type)

Begin by defining the types of Performance Centres required. The application comes pre-loaded with a number of performance centre types. These default centre types are Geographic Region, Business Division, Product Line, Business Department and Employee. Additional centre types can be defined by clicking on the **Categories** icon from within the *Performance Management* section of the Administration Launch Pad and following the same procedure that is documented in the Categories section of this guide. When creating new Centre Types please ensure that you select **Centre Type** as the record type.

Information

Category Name: The name of the type of performance centre. Note that when creating Performance Centres, this is the name users will see when picking the performance centre type.

Type: This picklist field can be configured to define further sub-typing information with each Centre Type. The picklist will first need to be populated as only sub-types for the Usage category are provided by default.

Description: Provide a more complete description for this type of Performance Centre.

Centre Type Indicators

Centre Type Indicators can be used to define which Performance Indicators will be displayed within each Performance Period of each Performance Centre by type. For example if all Geographic Performance Centres are to display a Performance Indicator for Electricity use, then a Centre Type Indicator for the Geographic Region Centre Type will need to exist.

Note

Controlling which Performance Indicators are displayed within Performance Periods via Centre Type Indicators can be overridden. If the field **Filter by Centre Type** on the Performance Centre is un-checked then the Centre Type Indicators defined here will not be applied.

To add a new Centre Type Indicator begin by clicking the **Centre** Indicators icon from within the *Performance Management* section of Administration Launch Pad. Find the Centre Type

that you wish to add Centre Indicators for and drill on its name (which is a hyperlink) to go to the Category detail page. Click on the **New Centre Type Indicator** button located in the header of the Centre Type Indicators related list (the last related list shown on the Categories screen for Centre Type categories). The Category name will be filled in by default, leaving only the Inventory to be populated.

Performance Centres (Definition)

See the Defining a Performance Centre section of this guide for details on creating Performance Centres in preparation for them to be populated with Performance Indicators from the CloudApps Sustainability Suite Inventories.

Source Allocations

This process assigns inventory balance amounts (and costs) into the Performance Centre (business structure) of your organisation so that these can more easily be monitored and managed. This approach allows for the relevant business owners to take ownership of the performance indicators that they have impact and control over. Budgets and targets can then be assigned (and aligned with the overall corporate sustainability goals and vision) enabling areas of operation to see how they are performing against their relevant performance indicators.

Once the performance centres your organisation intends to monitor and manage have been established you are ready to allocate balance amounts and costs (or a percentage subset) into one or more performance centres. The percentages to be allocated are specified by defining Source Allocations. Sources can be allocated to Performance Centres one source to one performance centre or one source to multiple performance centres. Click on the **Source Allocations** icon from within the *Performance Management* section of the Administration Launch Pad to go to the sources home page and then locate and select the individual source that you wish to allocate from.

The summary page for each source displays a related list of the Source Inventories that are maintained from the Source along with the Source Allocations currently being applied. Each Source Allocation will therefore result in a Performance Indicator for each of the Inventories listed in the source Inventories related list.

Source Allocation into Individual Performance Centres

To allocate one source to one performance centre click the **New Source Allocation** button in the Source Allocations section of the source summary or source details page (for instructions on allocating one source into multiple performance centres click here). For single performance centre allocations you will be presented with a data input screen allowing you to pick the individual performance centre you with to allocate inventory amounts into. The percentage of the relevant inventory balances (and costs) should be specified along with a date range to restrict the allocations if applicable.

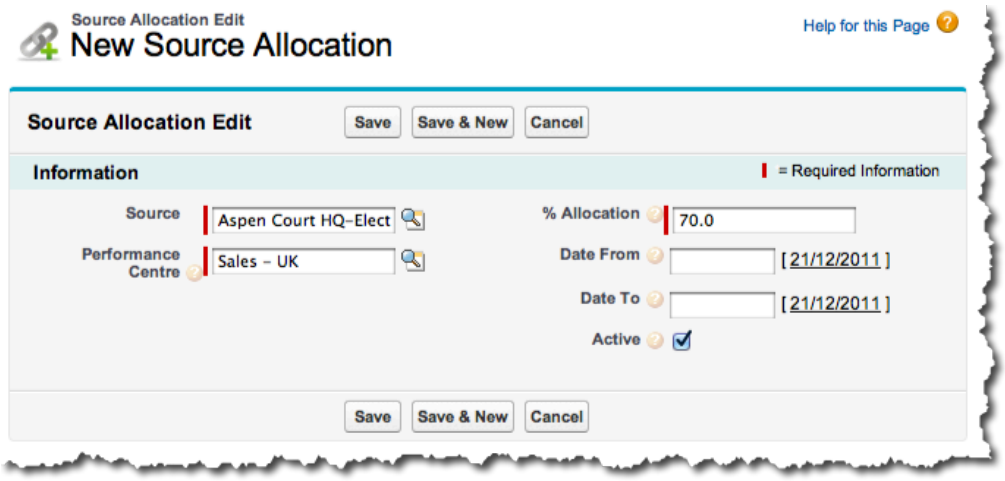


Figure 5.1 Performance Management – Allocation to a Single Performance Centre

The following fields are displayed and available for entry when creating a source allocation for a single performance centre:

Information

Source: The Source name will be entered by default. Only override this here if you wish to allocate a performance centre to a different source.

Performance Centre: Click the search icon next to the field in order to select the performance centre that you would like to allocate to this source.

% Allocation: Enter the percentage of the inventory amounts (and costs) that you wish to allocate to the performance centre.

Date From: Enter the start date if the allocations are to only start being applied from the specified date.

Date To: Enter an end date if the allocations are to stop being applied after the specified date.

Active: Check this box to activate the source allocation. The allocation engine will only execute active allocations.

Repeat this step for as many performance centres as you wish to allocate for each source.

Source Allocation to Multiple Performance Centres

To allocate one source to multiple performance centres click the **Multi Allocate** button on the source detail page (see figure 5.2).

Figure 5.2 Performance Management – Multi Allocate Button of Source Detail Page

You will then be presented with a data input screen containing three search fields that can be used in conjunction with one another to search for a subset of performance centres to

allocate into. Enter a search specification combination into these fields and click the **Search** button to retrieve the performance centres that meet the search specification combination that was entered. Having retrieved the matching performance centres you are now able to enter the allocation information (as described above) for each of the retrieved centres.

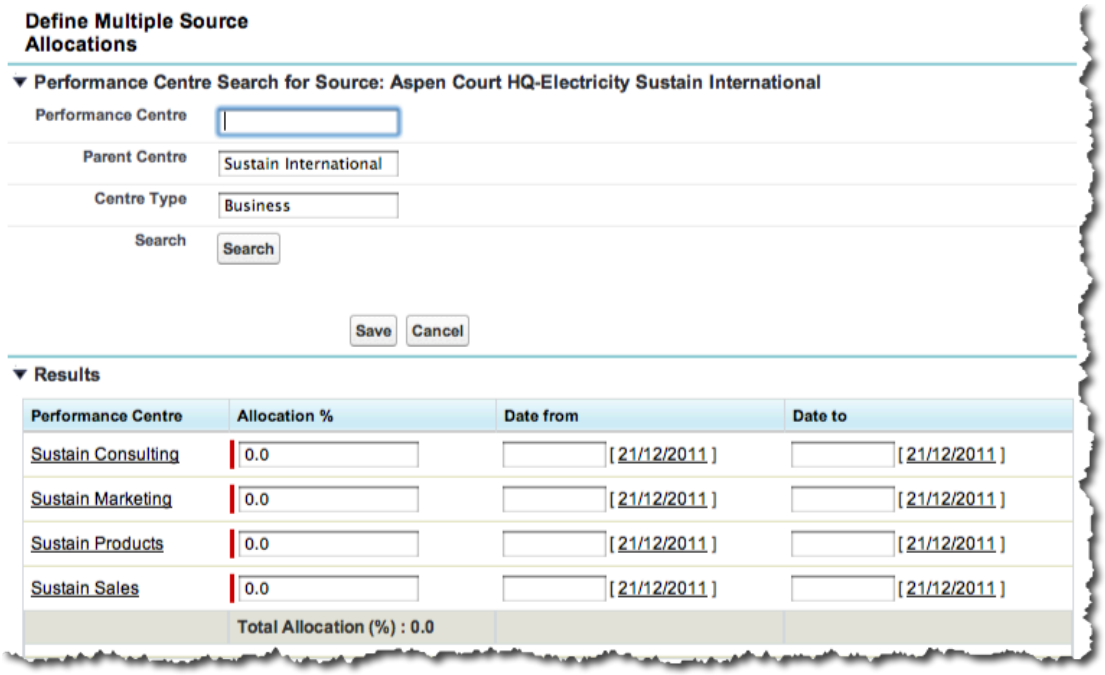


Figure 5.3 Performance Management - Allocation into Multiple Performance Centres

Allocation Engine (Processing Source Allocations)

Once source item data has been loaded (or manually entered) and source allocations have been defined you are ready to invoke the Allocation Engine. Performing this task will generate performance indicators containing indicator entry records for each inventory that is linked to a source containing source allocations for performance centres. This process should be re-executed after new data has been loaded and processed into inventories or on a frequency which suites your business operations.

The allocation engine will calculate the appropriate amounts (and costs) for each performance centre by applying the percentage you have chosen to assign (optionally across a date range). Once the allocation engine has run you will be able to view the allocated amounts and costs for each performance indicator across multiple time periods within individual performance centres. You will then be able to manage and compare performance centres. Further details on setting up, managing and comparing performance centres are contained in the Performance Centres section of this User Guide.

Overlapping or Alternate performance centre hierarchies are supported; hence the application provides the capability to 'over allocate' the same inventory data into different performance centre hierarchies. This allows for multiple perspectives of your organisation's performance. For example you could allocate the same sources into a geographic performance centre hierarchy and also into a product line hierarchy.

To process source allocations click on the **Allocation Engine** icon from within the *Performance Management* section of the Administration Launch Pad. This will display the

home page for Processing Source Allocations. From here you will be able to process all allocations or just the allocations for one or more individual sources.

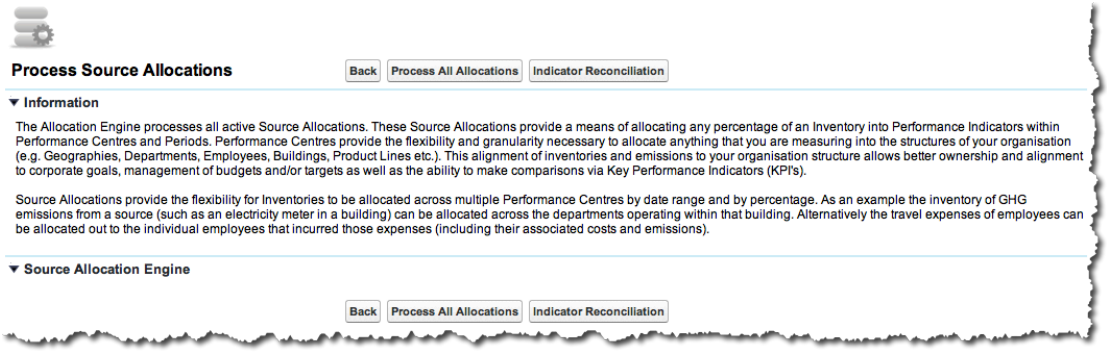

Process Source Allocations
Back
Process All Allocations
Indicator Reconciliation
Information
The Allocation Engine processes all active Source Allocations. These Source Allocations provide a means of allocating any percentage of an Inventory into Performance Indicators within Performance Centres and Periods. Performance Centres provide the flexibility and granularity necessary to allocate anything that you are measuring into the structures of your organisation (e.g. Geographies, Departments, Employees, Buildings, Product Lines etc.). This alignment of inventories and emissions to your organisation structure allows better ownership and alignment to corporate goals, management of budgets and/or targets as well as the ability to make comparisons via Key Performance Indicators (KPI's).
Source Allocations provide the flexibility for Inventories to be allocated across multiple Performance Centres by date range and by percentage. As an example the inventory of GHG emissions from a source (such as an electricity meter in a building) can be allocated across the departments operating within that building. Alternatively the travel expenses of employees can be allocated out to the individual employees that incurred those expenses (including their associated costs and emissions).
Source Allocation Engine
Back
Process All Allocations
Indicator Reconciliation

Figure 5.4 Performance Management – Processing Source Allocations

To process all source allocations click the **Process All Allocations** button. The console will display the status of this task, which is run in the background. To process allocations for specific sources, first select the sources required from the sources related list. Next, click on the **Process Selected Allocations** button, which is displayed at the top of the sources related list. On the subsequent confirmation page click the **Process Selected Allocations** button to go ahead and process the allocations for the sources selected. The console will then display the status of this task, which is run in the background.

Under normal circumstances you will see two batch jobs and each will initially have a status of *Queued*, then move to *Processing* and finally the status should show as *Completed*. Processing of the jobs will be split into batches with a running total that displays the number of batches that have completed processing. Successful completion of these jobs is indicated by a status of *Completed* with no *Failures*. If the task completes with failures you should log a Case with CloudApps (via the support website at support.cloudapps.com) in order to determine the cause and implications of the failure.

Indicator Reconciliation

In certain circumstances it may be necessary to delete Sources and/or source item records (effecting their associated inventory entries). If these are deleted after source allocations have been processed for a source then it will be necessary to reconcile the values in the indicator entry records.

Click the **Allocation Engine** icon from within the *Performance Management* section of the Administration Launch Pad and from the resulting Source Allocation Engine home page click on the **Indicator Reconciliation** button. This will perform reconciliation between the indicator entries and the inventory entries in the system and re-calculate indicator entries appropriately.

Sustainability Momentum

Before SuMo (Sustainability Momentum) users can begin using the SuMo employee engagement application the Sustainability Administrator will need to set-up and configure the game mechanics and access rights to certain information and news feeds. In addition to the specific tasks highlighted in the Sustainability Momentum section of the Administration Launch pad the additional tasks that will need to be performed are summarised here:

- The System Administrator will need to create user logins for each employee that is required to access and use SuMo. These users will need to be placed into a 'Role' and to be assigned the 'CloudApps SuMo User' profile. Colleagues within SuMo are assumed to be employees within the same 'Role', which in turn defines which employees will be displayed on the leader board shown in the SuMo application.
- SuMo users are able to view performance indicators for each Performance Centre that they 'own'. Accordingly Performance Centres for each employee (user) need to be created (ownership assigned) and populated with data (via Source Allocations and the running of the Allocation Engine). Note that users can be assigned ownership of more than one Performance Centre, enabling Performance indicators from more than one Performance Centre to be visible to each SuMo user.
- Goals need to be flagged as 'Published' to be visible to SuMo users.

Configuration

There are several configuration options available for SuMo. These settings typically need to be established at the start of a SuMo deployment. Some options can be changed whilst the 'game' is in progress but this is not recommended. Options are provided for ending the 'game' and resetting users scores and rewards back to their starting state. This enables the 'game' to be re-run for a new period, say a new financial year. The configuration options are divided into the six sections, described below.

Look & Feel

The logo that is displayed within the SuMo application can be changed from the default SuMo logo that is provided. Organisations are therefore able to brand the SuMo app if they wish. Whatever image is inserted here will be visible to the users the next time they start the application (not when the application is re-opened from an already running state). To insert a new image the administrator must first create a document (via the Documents tab), upload their image and flag the document as an 'Externally Available Image'. The image provided must be a .png file format on a transparent background that is 220 pixels wide and 70 pixels high for optimum display. Images that are of a different size will be scaled based on their vertical height. Once the document containing the image has been created click the **Insert an Image** button. The document containing the image should then be selected and the image within it will then be displayed. The image can be reset to the SuMo logo default by clicking the **Reset to default** button.

Reward Parameters

The scoring system that is maintained by SuMo has a primary metric called 'Experience'. Throughout the use of SuMo employees are encouraged to gain experience, as this is the primary measure or 'currency' that is used to rank employees, and show progress. In addition to experience there is also a lower level of 'currency' that must be configured and these are termed points. When setting up the game the administrator is required to define how many Points are equal to one

Experience. To do this they must enter a value in the "**Number of points that equal 1 Experience**" field.

Rewards can also be flagged as 'Automatically Awarded'. Those that are not must be 'Claimed' by the user from within the SuMo application. Unclaimed rewards will expire after a set number of days. To define the number of days that rewards are available before they expire the Administrator must enter a value (in days) into the "**Days until unclaimed rewards expire**" field.

Figure 6.1 SuMo Configuration Options – Reward Parameters

Levels

This section of the SuMo configuration options screen is used to define the levels that users will progress through as they 'play the game'. In addition to specifying a level number and label the achievement criteria necessary to trigger a 'Level-Up' (i.e. to proceed to the next level) needs to be defined. To edit the name of an existing level, click the **Edit** link beside the relevant level. Levels can be deleted (one at a time from the highest level down) by clicking the **Delete Highest Level** button.

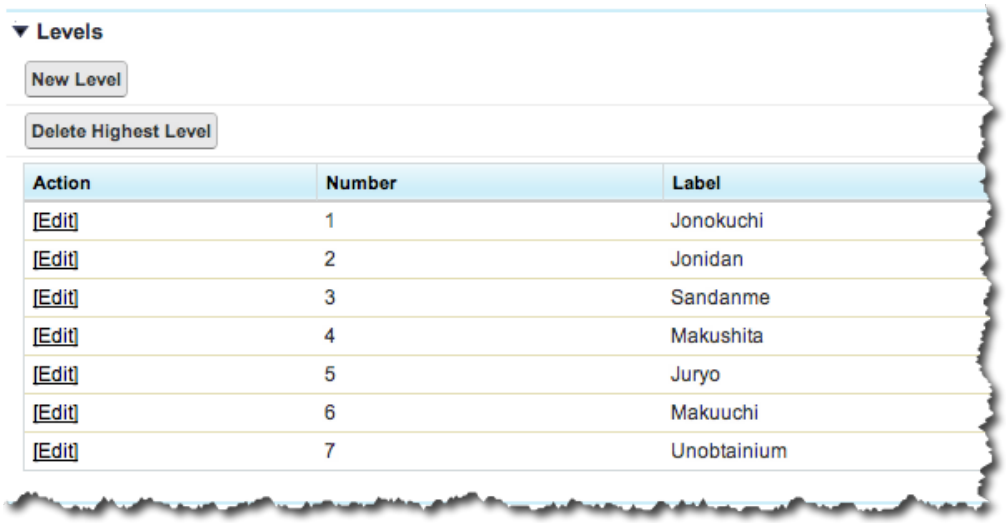


Figure 6.2 SuMo Configuration Options – Levels

To add a new level click the **New Level** button (the next number in the current sequence will be assigned) and enter the label that SuMo users will see when they obtain the relevant level. If this is the first level no achievement criteria are required and the Administrator is only required to click the **Save** button to establish the level. For subsequent levels click the **Save & Add Achievement** button to proceed onto the next step in the process, which is to define the achievement criteria required for attainment of that level. The following is an example Level-Up achievement:

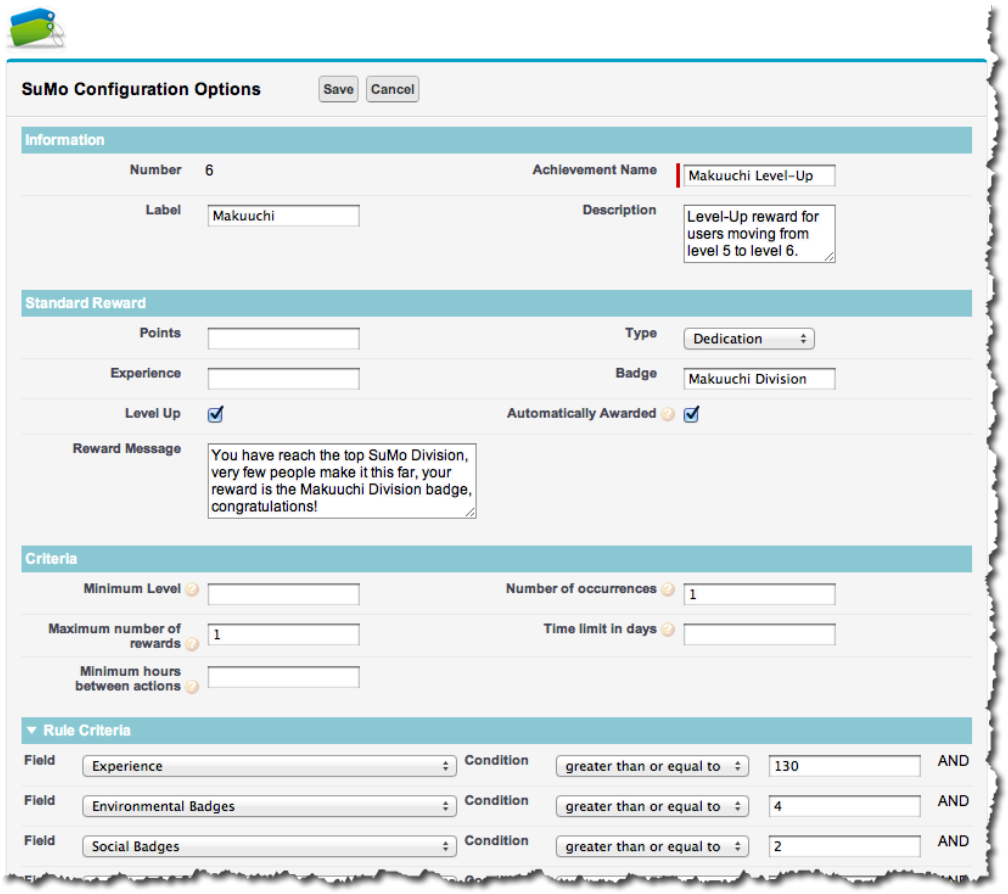


Figure 6.3 SuMo Configuration Options – Level-Up Achievement

The fields that are entered are the same as those defined for any stand-alone (Non-Challenge related) achievement. The following is a description of the fields displayed when creating the Level-Up achievement:

Information

Number: This is the level number that has been automatically assigned. It will be the next number in the sequence of levels already defined.

Label: The level label will be pre-populated with the name of the level that was entered in the previous step.

Achievement Name: This is the name of the achievement that is associated with the level being defined. The name will be pre-populated with the level name. It is recommended that the achievement name reference the appropriate level number or name to which it is associated as well as identifying that it is a Level-Up achievement.

Description: Use this field to provide an extended description for the Level-Up achievement if required.

Standard Reward

Points: Specify a number of Points that are to be awarded when the Level-Up is achieved. Only specify a value if you wish to reward the user with points in addition to the Level-Up itself (this is not typically the case).

Experience: Specify Experience that is to be awarded when the Level-Up is achieved. Only specify a value if you wish to reward the user with experience in addition to the Level-Up itself (this is not typically the case).

Level Up: This box must be checked (and will be so by default) as it specifies that the user will be rewarded with a Level-Up. This is therefore the essence of a Level-Up achievement as opposed to any other type of achievement.

Reward Message: Specify the reward message that will be recorded on the Level-Up reward. This reward message will be visible on the SuMo users performance screen in the Achievement Rewards section for the specified Badge Type (see below).

Type: Select the 'type' of Badge that will be awarded to users when the Level-Up achievement is rewarded. Level-Up rewards will typically be defined as 'Dedication' badge types.

Badge: Enter the name of the badge that users will be awarded when they achieve the Level-Up. This will be visible to users in the Achievement Rewards section of the Performance screen in SuMo.

Automatically Awarded: Check this option if the Level-Up reward is to be automatically awarded/received. This option will be checked by default, as Level-Up rewards will typically always be automatically awarded.

Criteria

Minimum Level: Specify the minimum level that the user must have obtained in order to be rewarded for this achievement. The previous level will be populated by default. If it is possible for a user to obtain two level-ups from achieving a single reward then care should be taken to adjust the minimum level accordingly. Note that this field can be left blank if this scenario is possible (it will depend on the other achievement rewards being defined).

Maximum number of rewards: Specify the maximum number of times the user can receive this reward. Each level will typically only be achieved once and this value is therefore pre-populated with the value '1'.

Minimum hours between actions: This option should be left blank for achievements where the number of occurrences are set at '1', see below.

Number of occurrences: Specify the number of times the achievement must be repeated before it will be rewarded. The achievement criteria for a Level-Up reward should typically be specified as '1' and this is the default value.

Time limit in days: Specify the number of days that the user has in which to complete the achievement. For Level-Up achievements this field should typically be left blank, as it is not applicable.

Rule Criteria (Related List)

Field: Use the picklist to select a field whose condition will be evaluated to determine if the condition is true (i.e. the achievement criteria has been achieved). For a Level-Up achievement the first rule field will be prepopulated with the 'Experience' to enable the Level-Up rule to be based on the amount of experience obtained by a user. This is typically the primary measure for defining Level-Ups and the reason it has been pre-populated.

Condition: Use the picklist to select the condition that is to be used when evaluating the contents of the field against the specified value. The condition for the first rule will be set to 'greater than or equal to' by default.

Value: For conditions that require a value enter the value in the field that follows the condition. Enter a value for Experience to complete the first rule for a Level-Up achievement.

Chatter Field Tracking

Chatter is an enterprise social messaging capability that enables users to collaborate together and also for the SuMo application to 'chat' to users informing them of relevant SuMo events.

The SuMo application can be configured to automatically generate these Chatter messages for the following SuMo events:

- Badges being awarded
- Users gaining Experience
- Level-Ups Rewards
- Pledges made on Challenges

This section enables the administrator to define which of these messages are automatically created and hence visible to SuMo users via Chatter, which is embedded within the SuMo app. All SuMo application users can view these application-generated messages in the section called theBuzz. The check boxes on Rewards are self-explanatory; the Status check box on User Challenges enables Pledges made by users to be displayed within theBuzz.

Assessment Engine

The criteria on Achievements can be assessed in real time when a record is created and/or edited. However there are also occasions where the assessment of achievements is only required at defined intervals and times, e.g. each evening or every weekend. Examples scenarios include rewarding users for remaining under budget on Performance Indicators, and that they should receive this reward once a week regardless of whether their data has been created or edited in that period.

Where this is the case one or more Assessment Engines can be set up to execute on a defined schedule. In addition there may be circumstances where the Assessment needs to be run outside of the normal schedule or for testing purposes. When this is the case the Administrator can queue an instant assessment at that point in time. To perform this task the Administrator selects the Object to be assessed from the pull-down list and then clicks the **Queue Single Assessment** button to queue the assessment engine. Note that conditions can also be applied to filter the records that will be assessed using the **Add a new condition** button (which will appear after an object has been selected). Using this option allows the administrator to select a field and a condition that is to be evaluated. The status of the resulting job can be seen in the '**Engine Status**' section displayed at the bottom of the page.

Figure 6.4 SuMo Configuration Options – Assessment Engine

Game Reset

This option is used to reset all game data for either users within a particular role or all users. Selecting this option will delete the appropriate users Rewards and User Challenges and set the users game performance scores back to their starting positions. Use this option with caution as each users game related data will be deleted and reset. This option is typically performed if the organisation intends to restart the game for a new period i.e. at the start of a new Financial Year.

To perform this option, select the Role of the group of users that are to be reset from the "**Role**" pull down list (the **All Roles** option will perform the operation for all users) and then click the **Reset** button. A warning message displayed, click **OK** to proceed or **Cancel** to cancel the operation. The reset job will be queued and the status of the job can be seen in the '**Engine Status**' section displayed at the bottom of the page.

Remember to click the **Save** button to store your changes, or **Cancel** to exit without saving the configuration changes that have been made.

Levels

This option allows the Administrator to view the Level-Up achievements associated with each level. The definition of each level is performed in the Configuration section described here. Clicking on the **Levels** icon will take the Administrator to the Achievements home page. Selecting the *Level-Up's* view from the View picklist (or clicking the **Go** button if it is already selected) will display all achievements that have been configured to reward the user with a Level-Up.

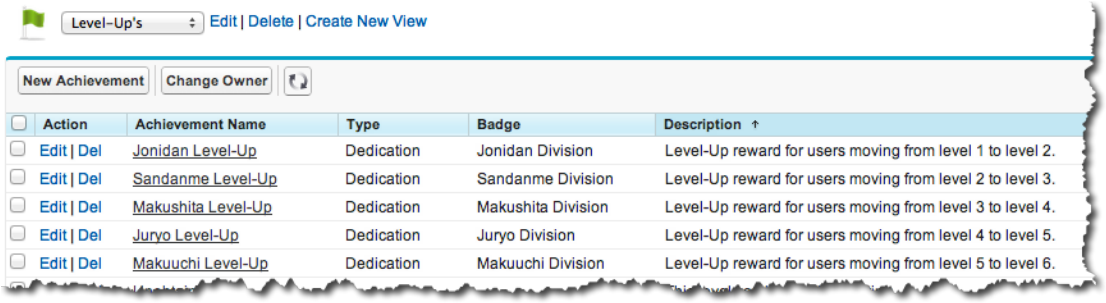


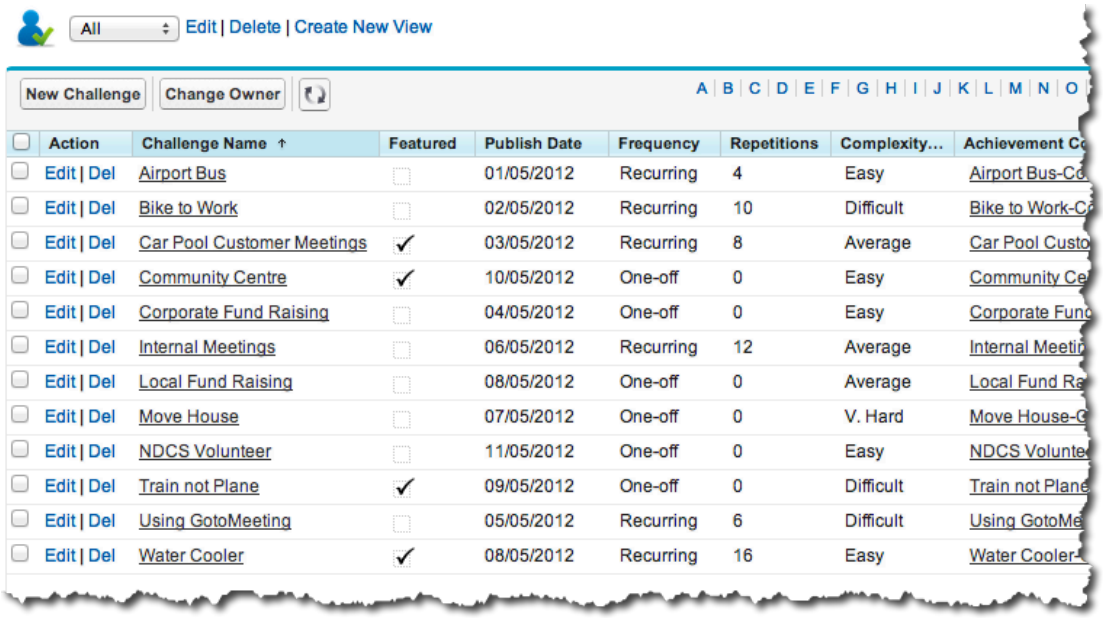
Figure 6.5 Level Up's Achievements View

Existing Level-Up achievements can be edited as well as reviewed from this screen.

Challenges

Challenges are defined by the Sustainability Administrator to 'challenge' employees to undertake tasks and activities that further the organisations sustainability objectives. Challenges can be one-off or repetitive in nature (i.e. requiring the task to be repeated a number of times). Separate Rewards can be allocated for accepting, repeating and completing a challenge (assuming that it is a recurring challenge).

Clicking on the **Challenges** icon will take the Administrator to the Challenges home page. The following screen shot shows a system with a number of Challenges already defined.



Action	Challenge Name	Featured	Publish Date	Frequency	Repetitions	Complexity...	Achievement C
Edit | Del	Airport Bus		01/05/2012	Recurring	4	Easy	Airport Bus-C
Edit | Del	Bike to Work		02/05/2012	Recurring	10	Difficult	Bike to Work-C
Edit | Del	Car Pool Customer Meetings	✓	03/05/2012	Recurring	8	Average	Car Pool Custo
Edit | Del	Community Centre	✓	10/05/2012	One-off	0	Easy	Community Ce
Edit | Del	Corporate Fund Raising		04/05/2012	One-off	0	Easy	Corporate Fun
Edit | Del	Internal Meetings		06/05/2012	Recurring	12	Average	Internal Meeti
Edit | Del	Local Fund Raising		08/05/2012	One-off	0	Average	Local Fund Ra
Edit | Del	Move House		07/05/2012	One-off	0	V. Hard	Move House-G
Edit | Del	NDCS Volunteer		11/05/2012	One-off	0	Easy	NDCS Volunte
Edit | Del	Train not Plane	✓	09/05/2012	One-off	0	Difficult	Train not Plane
Edit | Del	Using GotoMeeting		05/05/2012	Recurring	6	Difficult	Using GotoMe
Edit | Del	Water Cooler	✓	08/05/2012	Recurring	16	Easy	Water Cooler-

Figure 6.6 All Challenges View

To create a new Challenge, begin by clicking the **New Challenge** button. The following fields are displayed and available for entry when creating a new Challenge:

Challenge Information

Challenge Name: The name of the Challenge. This is the name that will be displayed in automatically generated chatter messages (assuming that the option to 'chat' Pledge messages has been enabled) each time a user Pledges to take a Challenge.

Complexity: Enter a numeric value from 1 to 4. This will be translated in to a text label to describe the complexity of the Challenge. By default the resulting complexity text labels will be as follows: Easy, Average, Difficult and V.Hard. These values can however be overridden by configuring the custom labels associated with them. The resulting complexity text is displayed in the action section of the SuMo application.

Frequency: Challenges can be One-Off or Recurring. A one off challenge does not need to be repeated and can only have a completion reward defined for it. Recurring challenges need to be repeated a set number of times (see repetitions below). Recurring challenges can have an acceptance reward, a repetition reward and a completion reward defined for them.

Repetitions: Enter the number of repetitions that need to be performed to complete a recurring Challenge.

Featured: Select this check box if the Challenge is to be 'featured' more prominently in the SuMo application. Featured challenges appear on the home screen of the SuMo Desktop and iPad applications and in a specific 'Featured Challenges' list (in the Action section) of SuMo for all platforms and devices.

Inventory: Entering an inventory that is related to the Challenge helps with reporting and is intended in the future to create a link between Performance Indicators (themselves derived from Inventories) and Challenges.

Publish Date: Enter a date to control when the Challenge is first 'published' i.e. the date on which the Challenge will first become visible to SuMo application users.

Retire Date: Enter a date to control when the Challenge is 'retired' i.e. the date after which the challenge is no longer visible to SuMo application users.

Role: Challenges can be made visible to all users in all roles or made visible only to users in a specified role. Select the role to limit visibility or leave the default value **<none specified>** if the Challenge is to be visible to all users.

Challenge Details

Full Description: Within the SuMo application users have the ability to display a more detailed description and/or other information related to the challenge. This information could include more detailed instructions on how to complete the challenge and/or details of the benefits that would be achieved by taking the challenge. This field is rich text area that can contain formatted text up to 32,000 characters long.

Additional Information: SuMo users also have the ability to link off to additional information via a URL. Entering a URL here will enable the SuMo user to view more information in the default browser on the device where they have the SuMo application installed.

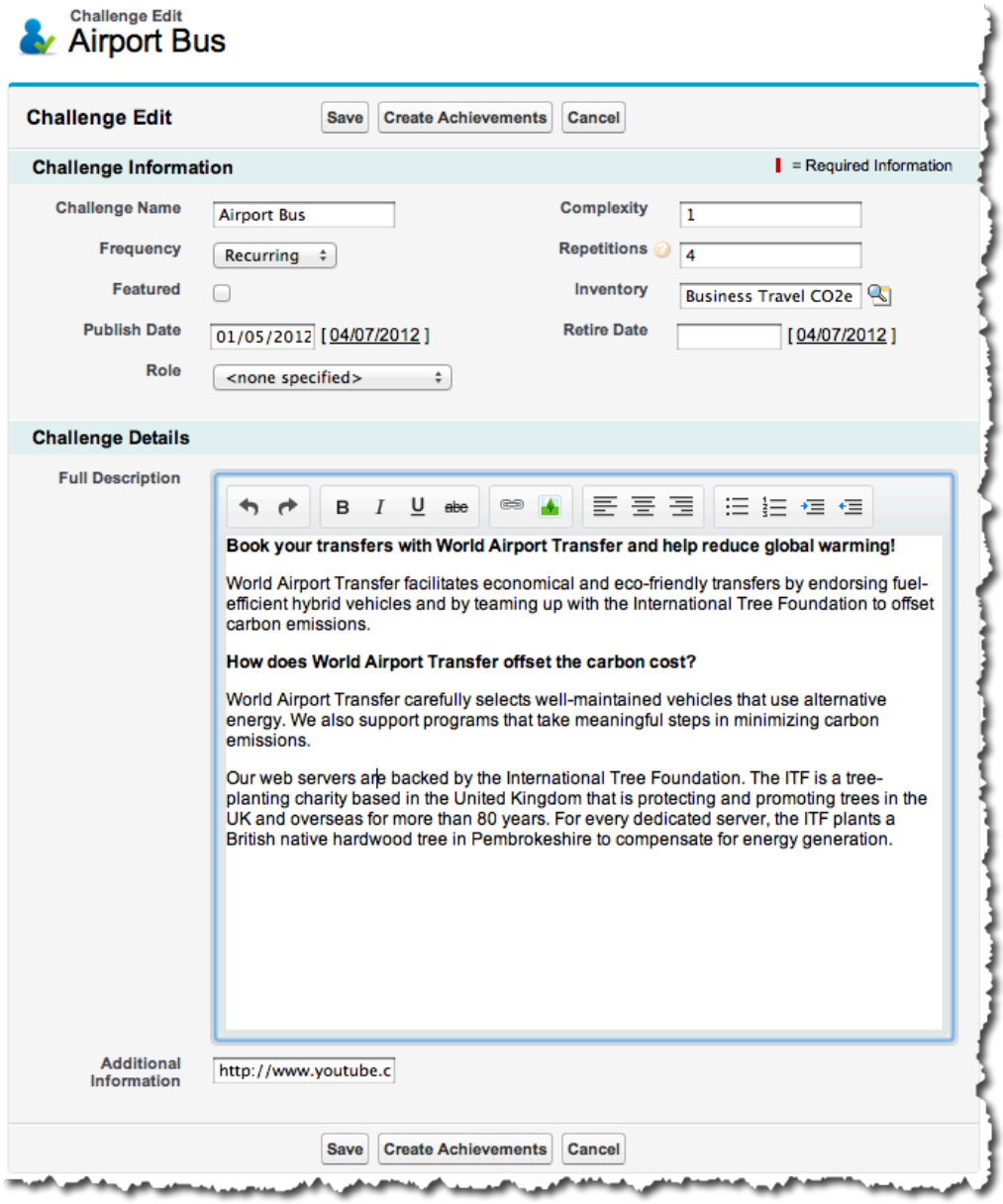

Challenge Edit
Airport Bus
Challenge Edit
Save
Create Achievements
Cancel
Challenge Information
= Required Information
Challenge Name
Airport Bus
Complexity
1
Frequency
Recurring
Repetitions
4
Featured
Inventory
Business Travel CO2e
Publish Date
01/05/2012 [04/07/2012]
Retire Date
[04/07/2012]
Role
<none specified>
Challenge Details
Full Description
Book your transfers with World Airport Transfer and help reduce global warming!
World Airport Transfer facilitates economical and eco-friendly transfers by endorsing fuel-efficient hybrid vehicles and by teaming up with the International Tree Foundation to offset carbon emissions.
How does World Airport Transfer offset the carbon cost?
World Airport Transfer carefully selects well-maintained vehicles that use alternative energy. We also support programs that take meaningful steps in minimizing carbon emissions.
Our web servers are backed by the International Tree Foundation. The ITF is a tree-planting charity based in the United Kingdom that is protecting and promoting trees in the UK and overseas for more than 80 years. For every dedicated server, the ITF plants a British native hardwood tree in Pembrokeshire to compensate for energy generation.
Additional Information
http://www.youtube.c
Save
Create Achievements
Cancel

Figure 6.7 New Challenge Edit screen

After defining the base challenge information the next step to complete the definition of the challenge is to define the associated achievement(s). To perform this step click the **Create Achievements** button at the bottom of the edit screen. The following fields are displayed and available for entry when creating the achievements for a repetitive Challenge. The Acceptance Reward and Repetition Reward sections will not be displayed for a One-Off Challenge.

Challenge Information

Description: Enter a description of the Challenge. This is the main description that SuMo users will see when they view the available challenges in the action area of the SuMo application. The description can be approximately 3 lines of text and should be considered to be mandatory.

Type: Select the 'type' of Badge (from the picklist provided) that will be awarded to the user on successful completion of the Challenge.

Minimum Level: Specify the minimum level that the user must have obtained before they will be rewarded for this achievement.

Badge: Enter the badge name that the user will be awarded on successful completion of the Challenge.

Time limit in days: Specify the number of days that the user has to complete the challenge after acceptance. This is only applicable to recurring challenges where the specified number or repetitions must be completed within the allotted time period in order to successfully complete the challenge (and earn the completion reward).

Acceptance Reward (Recurring Challenges only)

Points: Specify the number of points that are to be awarded when the user accepts a recurring Challenge (i.e. when they make their initial pledge).

Level Up: Checking this box would reward the user with a Level Up for accepting the Challenge. Note that offering a Level Up for accepting a Challenge would only happen in very rare circumstances.

Experience: Specify the amount of experience that is to be awarded when the user accepts a recurring Challenge (i.e. when they make their initial pledge).

Reward Message: Specify the reward message that will be recorded on the acceptance reward. Note that this reward message is not currently visible in the SuMo application and is therefore optional.

Repetition Reward (Recurring Challenges only)

Repetition Points: Specify the number of points that are to be awarded each time a user repeats their pledge for a recurring Challenge (i.e. when they make each repeat pledge).

Repetition Level Up: Checking this box will reward the user with a Level Up each time the user repeats their pledge on a recurring Challenge. Note that offering a Level Up for each repeat pledge on a recurring Challenge would only happen in very rare circumstances.

Repetition Experience: Specify the amount of experience that is to be awarded each time the user repeats their pledge on a recurring Challenge (i.e. when they make each repeat pledge).

Minimum hours between actions: Specify the amount of time (in hours) between each repetition pledge during which the repeat pledge will not be registered. This is a feature to restrict cheating, which stops users rapidly repeating pledges.

Repetition Reward Message: Specify the reward message that will be recorded on the repetition reward. Note that this reward message is not currently visible in the SuMo application and is therefore optional.

Completion Reward

Points: Specify the number of points that are to be awarded when the user completes a Challenge.

Level Up: Checking this box will reward the user with a Level Up when the user completes the Challenge.

Experience: Specify the amount of experience that is to be awarded when the user completes a Challenge.

Reward Message: Specify the reward message that will be recorded on the completion reward. This reward message will be visible to on the SuMo users

performance screen in the Achievement Rewards section. If this reward message is not specified then the Challenge Description will be displayed on the SuMo users Achievement Rewards section instead. Defining a separate reward message is recommended as it enables the language to be congratulatory rather than the typically more descriptive Challenge description.

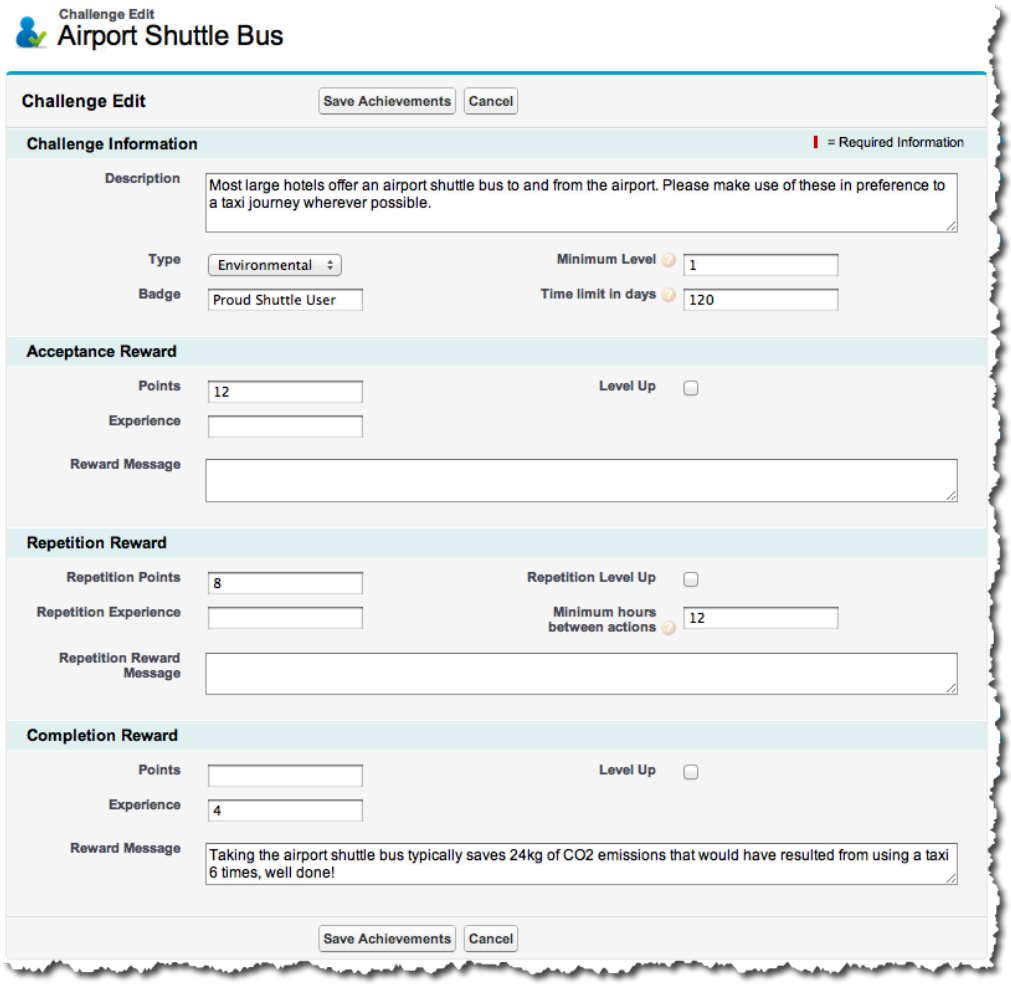


Figure 6.8 New Challenge (recurring) Achievements screen

Click on the **Save Achievements** button to save the Challenge achievement rewards and complete the process of defining a new Challenge.

Achievements

Achievements are used to define accomplishments and rewards. The built-in gaming engine evaluates these achievements to reward users with Badges, Experience, Points and Level-Ups. These rewards are then visible to employees using the SuMo Employee Engagement application.

Achievements are used to reward Challenges and Level-Up's, both of which have already been described in the preceding Levels and Challenges sections of this user guide. Achievements can also be defined to reward activities and accomplishments that are not related to Challenges (Non-Challenge) and that are not Level-Up's. Creating these stand-alone achievements will be described here.

Examples of achievements that are stand-alone could include rewarding a user for creating Ideas or Chatter posts, Commenting on Ideas or Chatter posts, sending and/or receiving friendship requests or for using the application several days in succession.

Achievements of this kind can be based on standard force.com platform objects such as the **Idea** object or the **Feed Item** (Chatter) object or on the SuMo **Event** object. The Event object is populated with a number of events that are detected in the local SuMo client application. After local events are detected they are submitted to the server (the next time the user is connected to the Internet) where they are recorded in the Event object. These event records contain a **Name**, **Action** and **Timestamp**. Achievements can then be configured to reward users based on the values recorded in these Event records. The nine events currently detected in SuMo and recorded in the Sustainability Suite application are as follows:

Name	Action
FriendRequest	Sent
FriendRequest	Accepted
FriendProfile	Viewed
ChatterPost	New
ChatterPost	Liked
ChatterPost	Commented
Idea	Voted
Idea	Commented
Application	Activated

By way of an example we will now step through the process required to create a stand-alone achievement for one of these events. In this example we will create a reward that encourages users to vote on Ideas that have been submitted. In this way we will encourage users to engage in the process of crowd sourcing Ideas, where the best ideas bubble to the top via voting. In a similar vein we could also reward the employees that create ideas by defining an achievement on the **Idea** object. However in our example we will reward employees with a Contribution Badge called "*Vote to Advance*" and 2 Experience each time they vote on 10 ideas provided it is within a 5 day period and that they are at level 2 or greater. In addition, this reward will be given a maximum of 8 times and it must be claimed each (i.e. it will not be automatically rewarded) otherwise it will expire.

Begin by selecting the **Administration** tab to view the Administrator Launch Pad. Click on the bottom accordion section named **Sustainability Momentum** to open the SuMo administration section. Next, click on the **Achievements** icon to go to the Achievements home page. To view only the existing Non-Challenge related activities select the view labelled "**Non-Challenge"** and click the **Go** button if required. To launch the New Achievement Wizard click on the **New Achievement** button.

Perform the following steps to create a new achievement; click on the **New Achievement** button to invoke the New Achievement Wizard. The initial step of the process is to select a record type. Select the **One-Off** from the available options (this should always be the record type for Non-Challenge achievements) and click **Continue**.

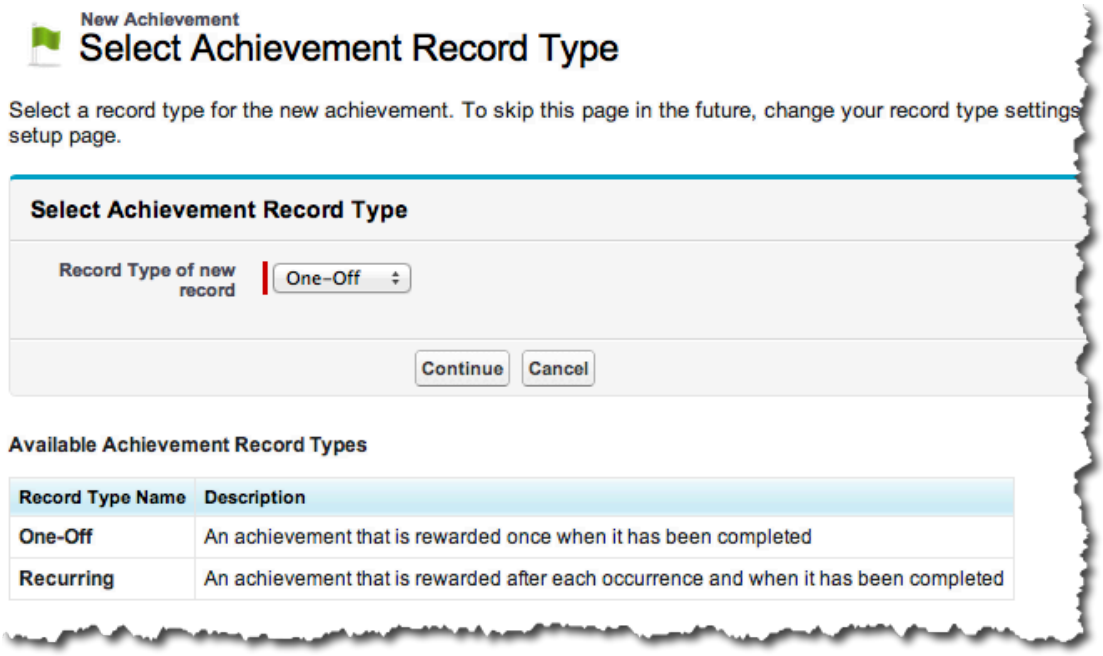

New Achievement
Select Achievement Record Type
Select a record type for the new achievement. To skip this page in the future, change your record type settings
setup page.
Select Achievement Record Type
Record Type of new record
One-Off
Continue
Cancel
Available Achievement Record Types
Record Type Name
Description
One-Off
An achievement that is rewarded once when it has been completed
Recurring
An achievement that is rewarded after each occurrence and when it has been completed

Figure 6.9 New Achievement (Select Achievement Record Type)

On the next screen (**Step1:Select Object**) you will need to select the object on which the assessment of the criteria will be based. From the **Object** picklist select the **Event** object (for this example, others can also be used i.e. **Idea** and **Feed Item**) and then click the **Next** button to continue.

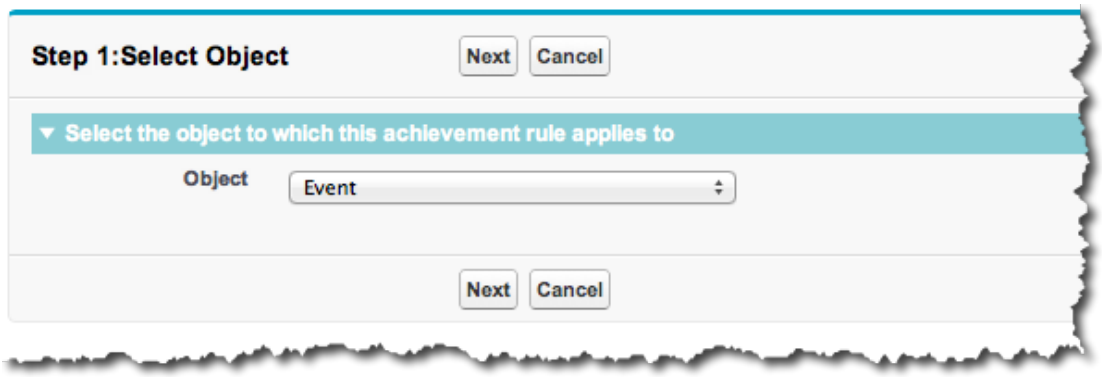


Figure 6.10 New Achievement (Select Object)

On the next screen (**Step 2: Configure Achievement Rule**) the achievement needs to be named (in the **Achievement Name** field) and a description written (in the **Description** field). In our example we want to evaluate the Event records when they are created (they do not get updated), therefore select the '**Only when a record is created**' radio button and then click the **Next** button to continue to the final step of the process.

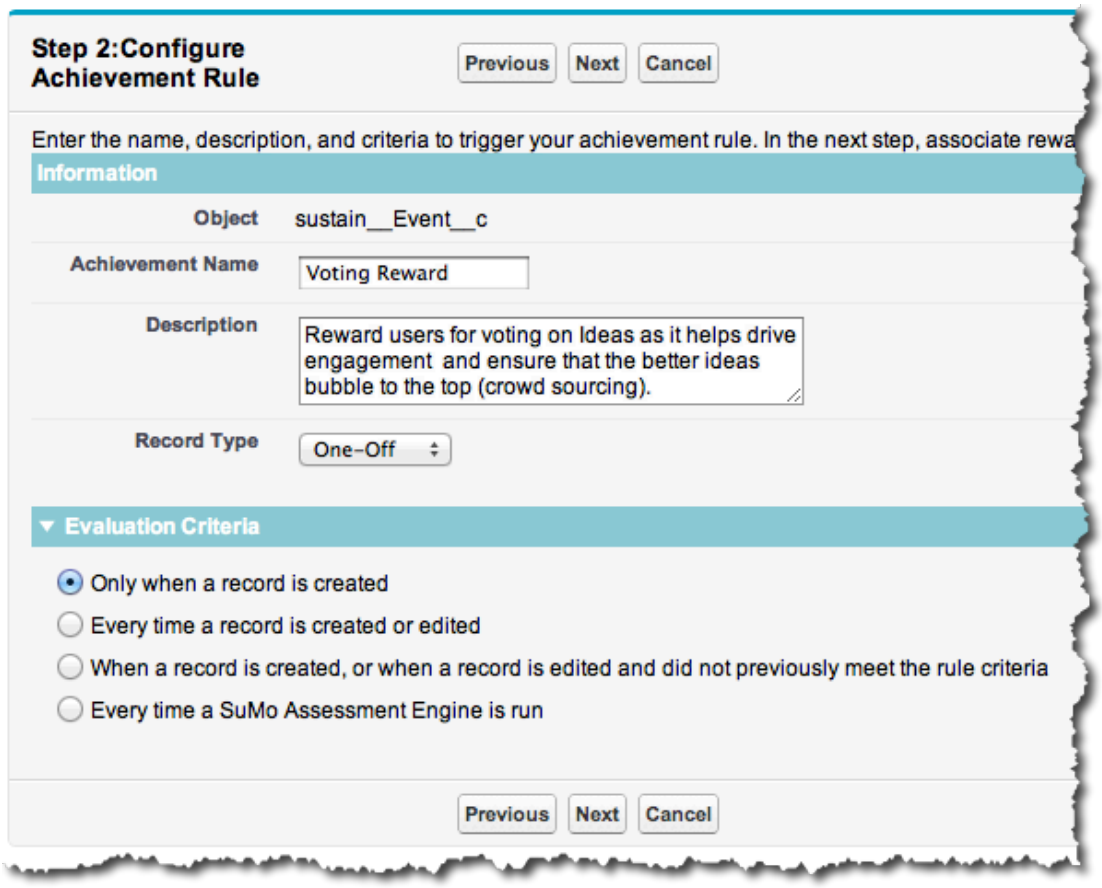

Step 2:Configure Achievement Rule
Previous
Next
Cancel
Enter the name, description, and criteria to trigger your achievement rule. In the next step, associate rewa
Information
Object
sustain__Event__c
Achievement Name
Voting Reward
Description
Reward users for voting on Ideas as it helps drive engagement and ensure that the better ideas bubble to the top (crowd sourcing).
Record Type
One-Off
Evaluation Criteria
Only when a record is created
Every time a record is created or edited
When a record is created, or when a record is edited and did not previously meet the rule criteria
Every time a SuMo Assessment Engine is run
Previous
Next
Cancel

Figure 6.11 New Achievement (Configure Achievement Rule)

The final step (**Step 3:Configure Rewards**) is where the recipient, reward and criteria are all defined. The following fields are displayed and available for entry when creating the achievement.

Reward Recipient

Recipient: Select the recipient from the available options in the picklist. This will vary depending on the Object selected in the first step of the process. This is typically the ID of the user that created the record, last updated it or is associated with it in some way i.e. a Parent.

Standard Reward

Points: Specify the number of points that are to be awarded when the achievement criteria has been obtained.

Experience: Specify the amount of experience that is to be awarded when the achievement criteria has been obtained.

Level Up: Checking this box will reward the user with a Level Up when the achievement criteria have been obtained.

Reward Message: Specify the reward message that will be recorded on the completion reward. This reward message will be visible to on the SuMo users performance screen in the Achievement Rewards section.

Type: Select the 'type' of Badge that will be awarded to the user when the achievement criteria has been obtained.

Badge: Enter the badge name that the user will be awarded when the achievement criteria has been obtained.

Automatically Awarded: Check this box is the reward is to be automatically received. Leave it un-checked if the user is required to claim the reward within a specified number of days (defined on the Sustainability Momentum configuration screen).

Criteria

Minimum Level: Specify the minimum level that the user must have obtained in order to be rewarded for this achievement.

Maximum number of rewards: Specify the maximum number of times the user can receive this reward. This allows the reward to be repeated a maximum number of times. After this limit has been reached the user will no longer be rewarded even if they meet all the other criteria.

Minimum hours between actions: The action that is being monitored will only be registered after the number of hours defined in this field has passed. This parameter can be used to combat users attempting to cheat the system by operating outside of the spirit of the intended reward. An example might be where you want to reward a user for using the application 5 times (the Application Activated event), but you don't want them to open and then immediately close the app 5 times in a row just to earn the reward. In this example you would set a time limit between each action registering e.g 18 hours, hence attempting to ensure that only one activation event per day is recorded.

Number of occurrences: Specify the number of times the achievement must be repeated before it will be rewarded.

Time limit in days: Specify the number of days that the user has to complete the achievement. Use this parameter when the specified number of occurrences must be completed within the number of days defined here to earn the reward.

Achievement Criteria (Related List)

Field: Use the picklist to select a field whose condition will be evaluated to determine if the condition is true (i.e. the achievement criteria has been achieved). Up to 6 fields can be evaluated in this way and each condition must be true for the overall achievement criteria to be met.

Condition: Use the picklist to select the condition that is to be used when evaluating the contents of the field against the specified value. The conditions 'is incremented' and 'is changed' do not require a value to be entered in the following value field in order to be evaluated.

Value: For conditions that require a value enter the value in the field that follows the condition.

Use the following screen shot to complete the configuration of the example achievement. The values being used in this example are displayed in the table that lists the nine supported SuMo local events here.

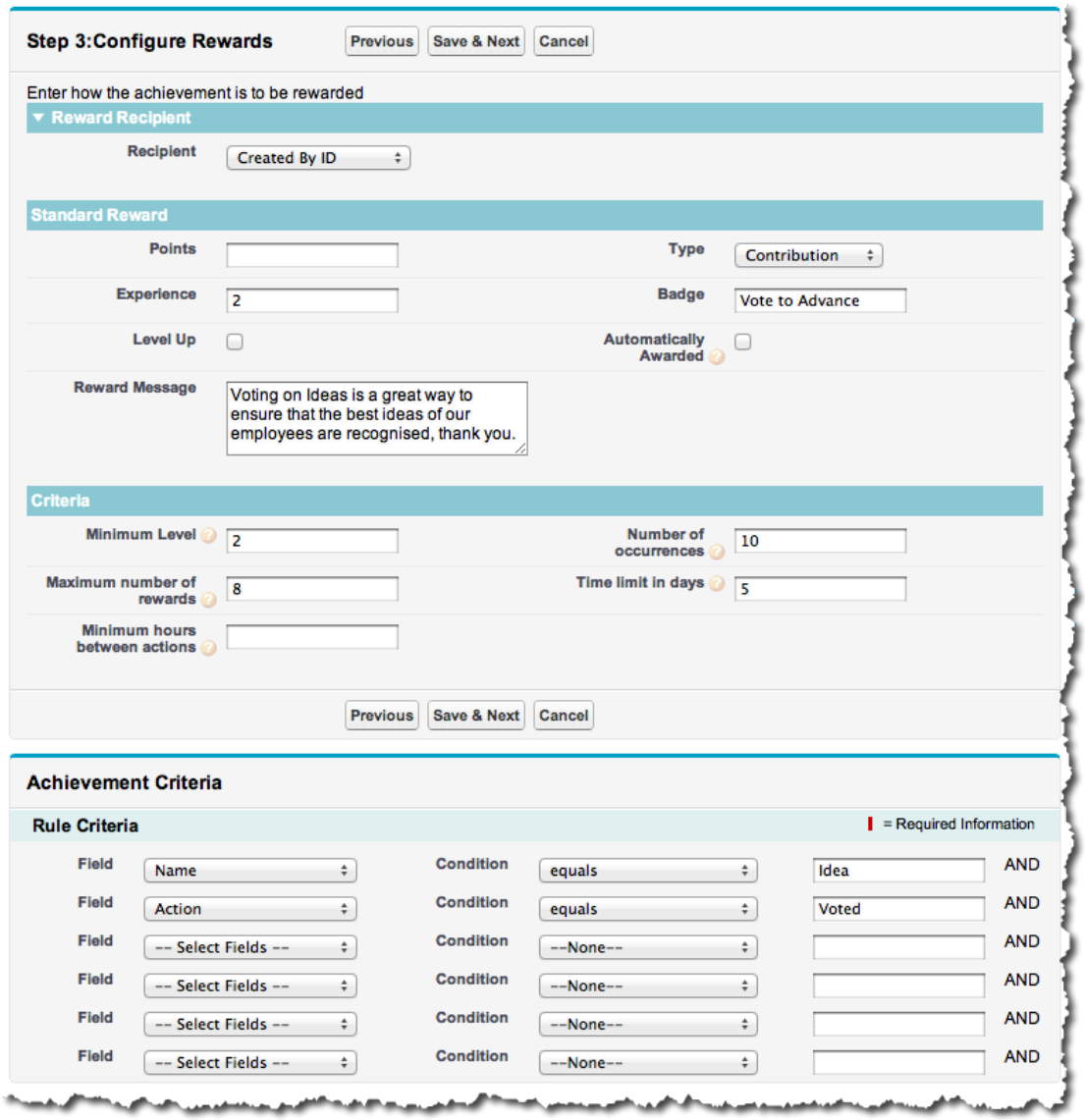


Figure 6.12 New Achievement (Configure Rewards)

Having entered all the relevant information on the 3rd step of the New Achievement Wizard, click the **Save & Next** button to complete the process.

Feeds

Within theBuzz section of the SuMo application users can see and read news stories that their organisation has published. The Sustainability Administrator defines the feeds that are to be made available to all SuMo users here.

Information

Feed Name: The name of the news feed, as it will appear in theBuzz to all SuMo application users.

URL: Enter the complete URL that is to be used by the SuMo application to retrieve the RSS news feed.

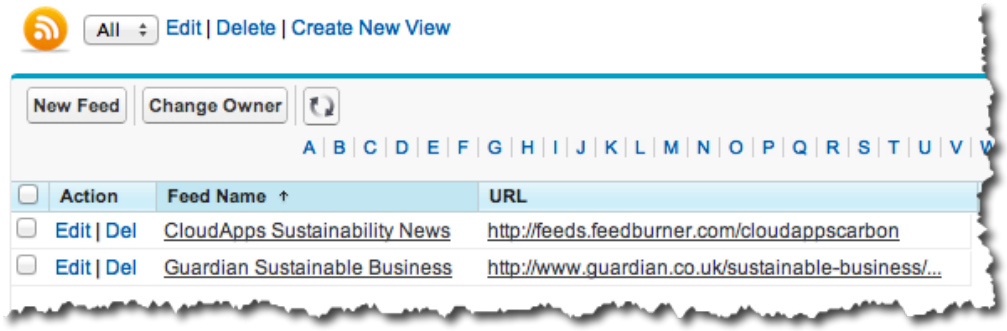


Figure 6.13 Feeds

It should be noted that any number of news feeds can be published but careful consideration to the performance impact should be taken. Each device will use this information to fetch the specified news feeds. These can contain large amounts of data will need to be retrieved using the network connection available to each mobile or desktop device running the SuMo application. Hence the number of news feeds configured here can affect the performance of each individual device.

Assessment Engines

There are certain circumstances where achievements need to only be assessed and rewarded at defined intervals and times (i.e. to a schedule). To cater for these requirements the ability to schedule an Assessment Engine is provided. This is specified when an achievement is first created in the second step of the process (**Configure Achievement Rule**). In this step the evaluation criteria radio button "**Every time a SuMo Assessment Engine is run"** should be selected**.** This indicates to the system that the achievement will only be evaluated when an Assessment Engine is run for the Object on which the achievement is based. These Assessment Engines can in turn be scheduled so that they run on set days and at set times each week.

By way of an example we will walk through the process of setting up an assessment engine to evaluate and reward users once per working day for each Performance Indicator that is under budget at the time the assessment is performed. For reference the achievement that will be assessed is show in the following screen shot. The way this example assessment has been defined is that users will receive 10 Points (that must be claimed i.e. they are not automatically awarded) for each Performance Indicator that has a **Threshold Type** which equals **Budget**, where the **Projected Variance from Threshold Amount** (i.e. Budget Amount) is less than or equal to **zero** and only for Performance Indicators in the current period (i.e. **Current Period** equals **Yes**).

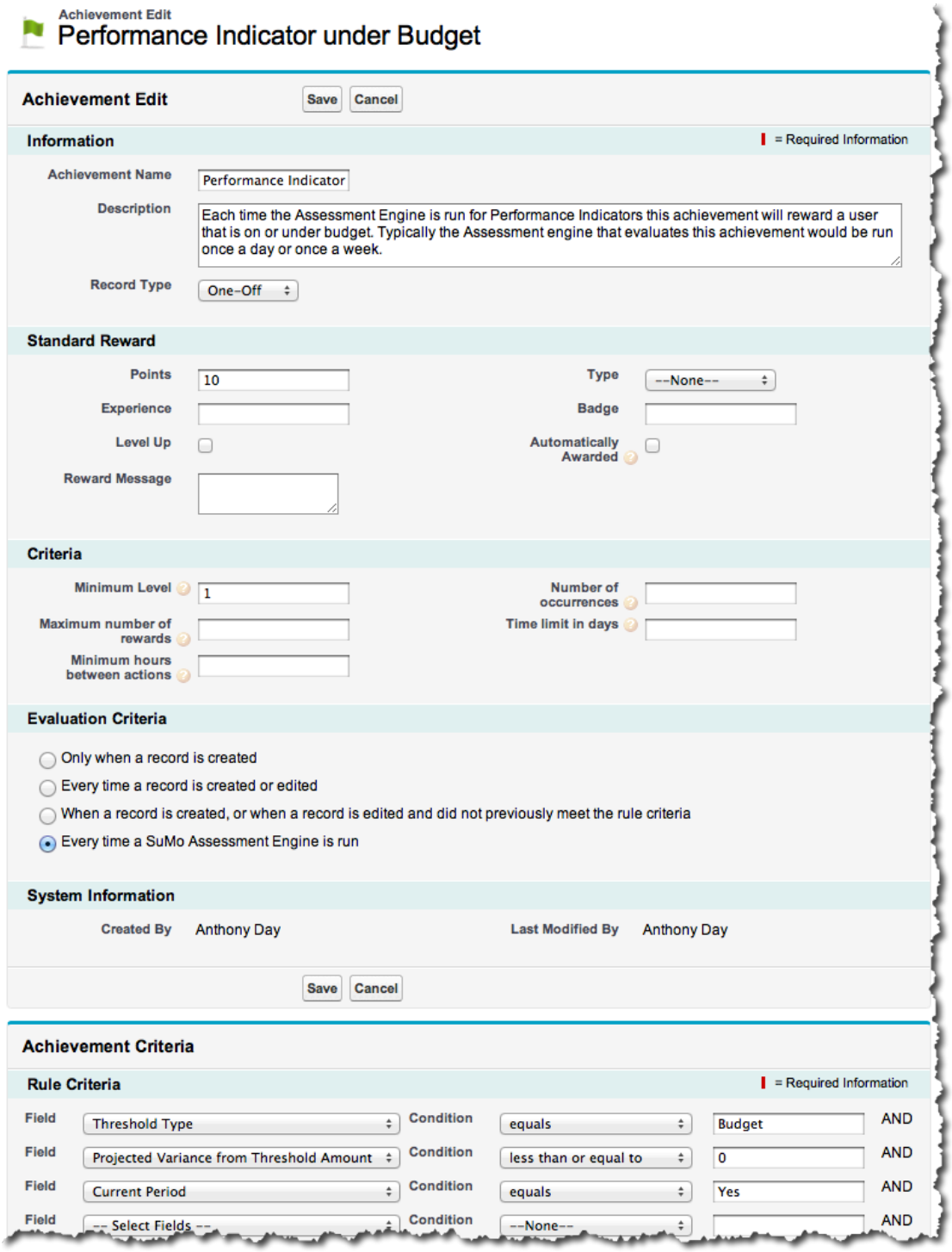


Figure 6.14 Example Achievement (being evaluated by the Assessment Engine)

Begin by selecting the **Administration** tab to view the Administrator Launch Pad. Click on the bottom accordion section named **Sustainability Momentum** to open the SuMo administration section. Next, click on the **Assessment Engines** icon to navigate to the Scheduler Settings page. This is where the Administrator can define a schedule for any of the Sustainability Suite Engines including the scheduling of one or more Assessment Engines.

To schedule an Assessment Engine click the **New** button at the top or bottom of the page. This will open the Schedule Settings page. Using the Object picklist, select the Object that is

to be assessed (for our example we will schedule assessment of the **Performance Indicator** object). Next specify the day(s) and time that the Assessment engine will be queued to run.

This is typically all that needs to be defined, however if you wish to only assess a subset of records on the chosen object these can be specified by adding a filter condition. To add a new condition, click the **Add a new condition** button. You will then be able to select a field, condition and a value to be used to filter the records that will be assessed against the achievement.

In our example we will filter the Performance Indicators so that only those belonging to a Performance Centre that has a Centre Type = 'Employee' (as screen in the screen shot below) will be assessed.

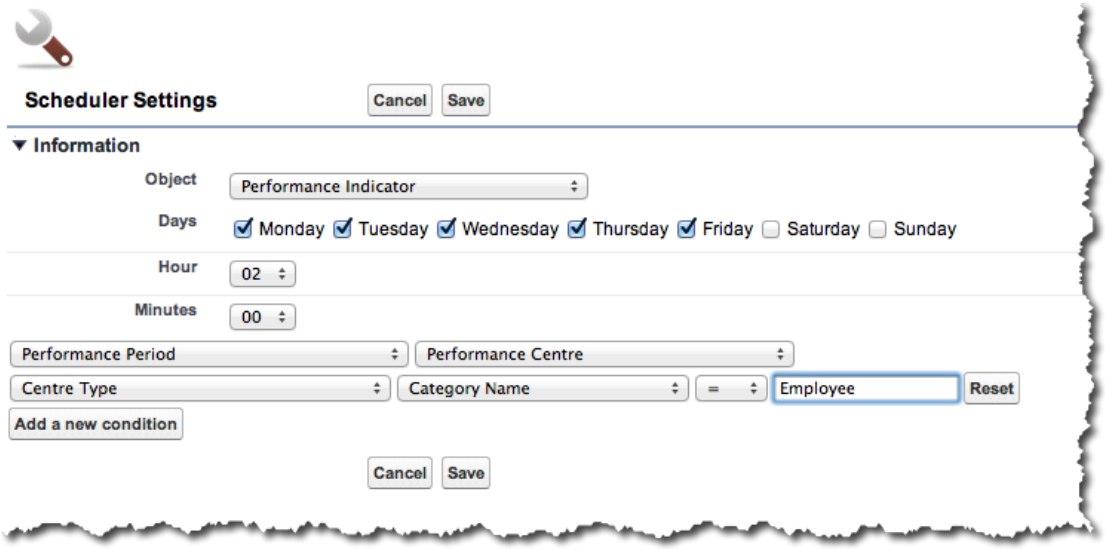


Figure 6.15 Defining Scheduler Settings (for an Assessment Engine schedule)

Further conditions can be added to further filter the data being assessed by the achievement. Note that each condition will be applied so only records that match all the conditions will be returned to the Assessment engine for evaluation of the achievement.

Once complete, click the **Save** button to save the scheduler settings. You will then be returned to the main Scheduler Settings screen. The last step in the process is to then start the scheduler for the Assessment Engine that has just been specified. To do this click the **Start Schedule** button below the relevant Assessment Engine. The Schedules can be amended and deleted from here also.

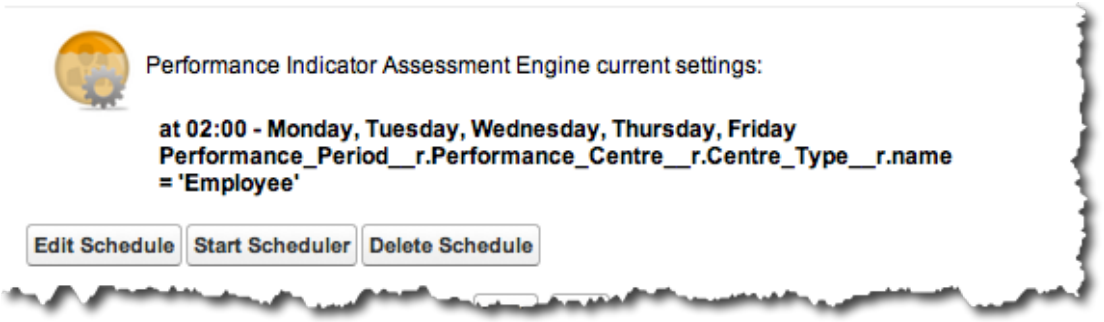


Figure 6.16 Assessment Engine schedule (with a condition)

Viewing Batch Apex Job History

The CloudApps Sustainability Administrator can view a history of all the batch jobs that have been submitted. To view the batch job history, select **Setup** from the user menu (the pull down list under your user name displayed in the application banner, at the top of the page) then **Administration Setup | Monitoring | Apex Jobs** to view a list of the job history.

This screen will show you a list of Apex jobs along with details of the date they were submitted, the job type, the status of the job, who the job was submitted by, its completion date along with details of the number of batches processed and a count of any failures. The type of Apex job can be determined from the Apex Class name also listed in this screen.

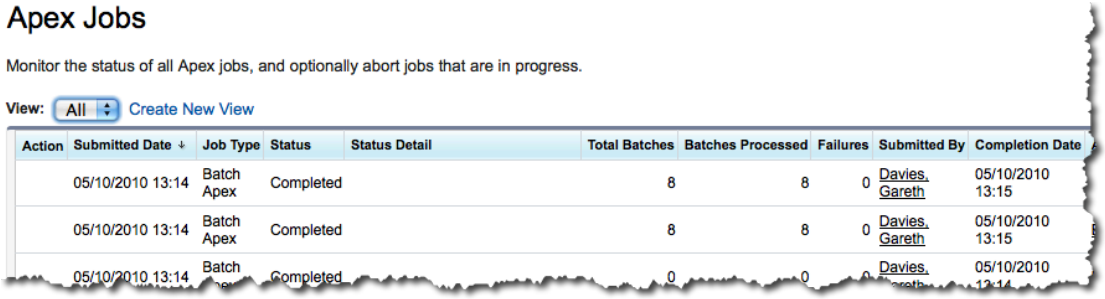

Apex Jobs
Monitor the status of all Apex jobs, and optionally abort jobs that are in progress.
View: All Create New View
Action Submitted Date Job Type Status Status Detail Total Batches Batches Processed Failures Submitted By Completion Date
05/10/2010 13:14 Batch Apex Completed 8 8 0 Davies, Gareth 05/10/2010 13:15
05/10/2010 13:14 Batch Apex Completed 8 8 0 Davies, Gareth 05/10/2010 13:15
05/10/2010 13:14 Batch Completed 0 0 Davies,

Figure 7.1 Batch Apex Jobs – Viewing Batch Job History

(Data) Sources

Sources Overview

Data Sources (simply referred to as Sources in the application) are the place in the application where the raw data for any Sustainability Source is captured. Effectively any type of data source can be captured including Electricity, Gas & Water meters, passenger & freight transport, process and fugitive emissions, social & economic information, waste disposal data and more.

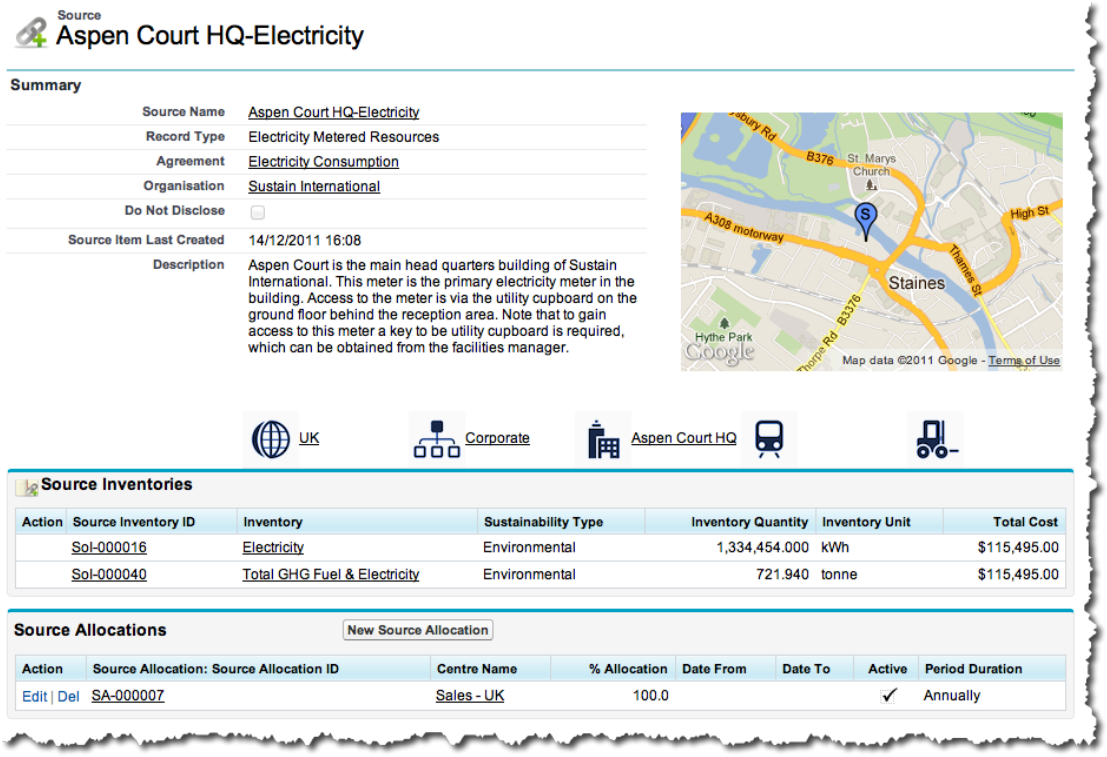


Figure 8.1 Sources – Source Summary

Viewing Sources

After selecting the Sources tab you will be presented with the Sources home page with either the most recently viewed, created or modified sources being displayed (if there are any). From here you can view a list of sources by clicking on the **Go** button displayed alongside the View picklist. Selecting 'All' in the view picklist will display all Sources. Additional views (that filter the Sources list) may also be available and these can also be selected here.

To view and/or edit an individual source click on the source name which is a hyperlink and will be underlined. Performing this action will take you to a summary page for that individual source. From here you will be able to view an overall summary of the source (including it's geographic location and categorisation) along with its associated source inventories and source allocations. Note that the map shown on the source summary page is an optional feature that makes use of maps provided by Google. The map will only be displayed if geocoding settings have been configured to provide 3rd party access in order to derive a latitude and longitude from a postcode.

To view full details of the source click on the source name hyperlink. This will then display the source details page containing all details for the source along with it's associated source item records plus any notes and attachments.

Defining a Source

The minimum information that needs to be defined for each source will depend on the type of source being defined. However it is recommended that for each source you define as much additional information as is possible and as will be useful for information disclosures and for performing analysis and reporting.

There are several ways that you can define a new source in the application:

1. From the Sources home page clicking on the **New** button (in the 'Recent Sources' area) will initiate the process for defining a new source.

2. From any view you can click the **New Source** button to initiate the process of defining a new source.

3. When viewing an existing source from the source detail page you can click the **Clone** button. This will create a cloned copy of the currently viewed source thus enabling you to make changes to the cloned copy and then save the modified information as a new source.

4. By importing the source definition from an external data file. External data files must be in CSV (Comma Separated Values) format with the first row of the data file containing field names that match the field names used by the application.

Important

Data Import is a function that can only be performed by the System Administrator (not the CloudApps Sustainability Administrator). See Data Import Tools & Recommendation in the Appendix for details on how to install and access the data import tools along with recommendations on which tools to use in which circumstances.

When defining a new source via the user interface you will be required to select the source record type. Select one of the six source record types from the picklist and then click **Continue.**

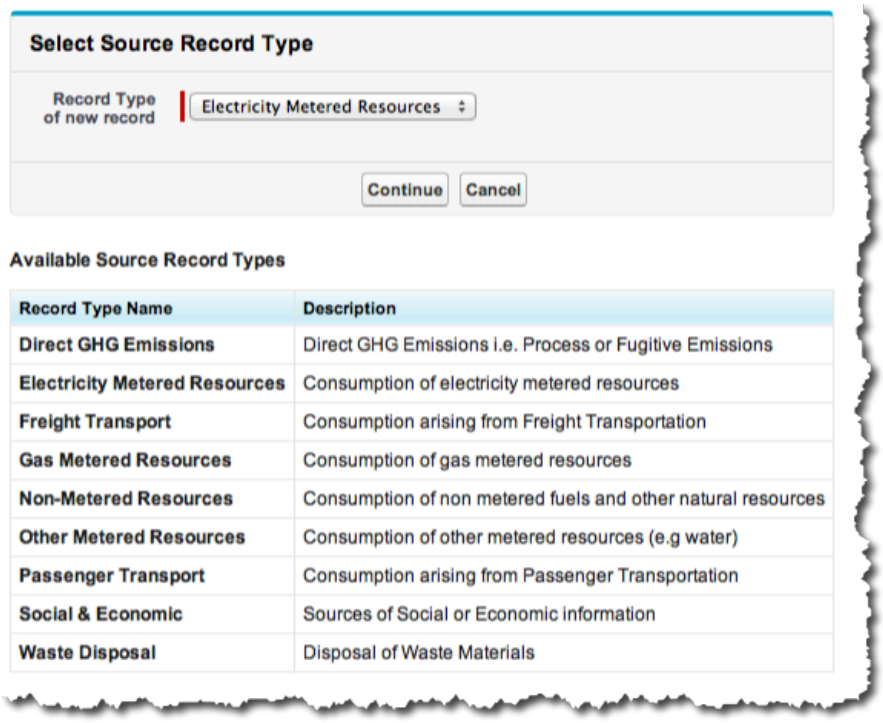


Figure 8.2 Sources – Selecting the Source Record Type

The source record type you choose will govern the subsequent fields that are then available.

Fields shared across all record types

Some source fields are common across each of the source record types. These common fields are described first. Fields that are specific to one or more record types are described in the relevant record type sub-sections.

Information

Source Name: Enter a name that uniquely identifies this source.

Agreement: this is the name of the posting agreement that will be used to process the source items associated to the source into source inventories

Default Source Key: The default source key (if specified) will be applied to all source item records that are created without a source key having been specified.

Description: Use this field to provide a full description of the source.

Organisation: Enter the name of the organisation that owns the source. This is typically the organisation that is responsible for paying the bill. Clicking the search icon next to the field name will open a lookup window enabling a search of the available organisation names. Linking sources to organisations will enable disclosures, reporting and analysis by organisation.

Note

Organisations must be defined prior to this step in order to be able to enter them here. See Disclosing Organisations and Significant Group Undertakings in the General Administration section of this guide for further details.

Do Not Disclose: Flagging a source as 'Do Not Disclose' (by checking this box) will ensure that the source is omitted from all Disclosures at the time they are calculated.

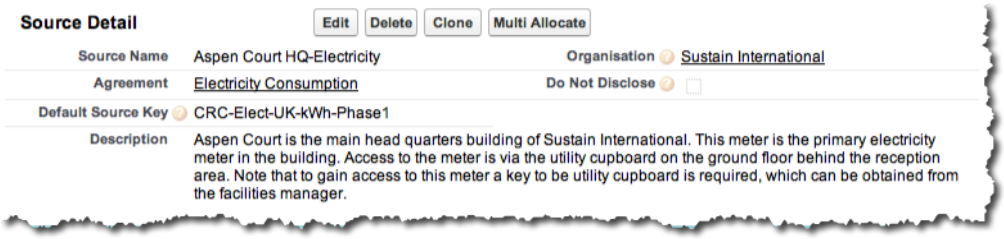

Source Detail
Edit
Delete
Clone
Multi Allocate
Source Name
Aspen Court HQ-Electricity
Organisation
Sustain International
Agreement
Electricity Consumption
Do Not Disclose
Default Source Key
CRC-Elect-UK-kWh-Phase1
Description
Aspen Court is the main head quarters building of Sustain International. This meter is the primary electricity meter in the building. Access to the meter is via the utility cupboard on the ground floor behind the reception area. Note that to gain access to this meter a key to be utility cupboard is required, which can be obtained from the facilities manager.

Figure 8.3 Sources – Primary Information

Category Information

Note

Categories are a means of tagging source item records so that source information can be categorised in disclosures, dashboards and reports. Categories must have been defined prior to this step in order to be able to enter them here. See Categories in the General Administration section of this guide for details on defining and updating category reference data.

The following five categories are available:

Geography: Enter a geographic category name from the ones that have been defined by the Sustainability Administrator. Clicking the search icon next to the field name will open a lookup window enabling a search of the available category names. This category is used in CDP disclosures

Division: Enter a business division name from the ones that have been defined. This category is used in CDP disclosures for disclosing both scope 1 and scope 2 emissions by Business Division.

Facility: Enter a facility name from the ones that have been defined. This category is used in CDP disclosures to disclose scope 1 and scope 2 emissions by Facility.

Usage: Enter a usage description from the ones that have been defined. Examples include: Business travel, Employee commuting, Waste generated in operations, Supplier emissions etc. This category is used in CDP disclosures to define the use of scope 3 emissions sources.

Asset: Enter an asset name from the ones that have been defined. This category is used in some dashboards and reports.

Figure 8.4 Sources – Category Information

Location Information

Street Address: Enter the street address for the source (multiple lines available).

Town / City: Enter the town or city name.

County / State: Enter the county or state.

Postal / Zip Code: Enter the postal or Zip code. This information will be used to derive the latitude and longitude information that is required to display the source location on the map display. Note looking up the latitude and longitude of a postal code is an optional capability that will need to be configured by the Sustainability Administrator. See Geocode Settings in the General Administration section of this guide for details on setting up geocoding for source records.

Country: Enter the two-digit ISO country code to identify the country in which the source is located. This information is required for both UK CRC and CDP disclosures.

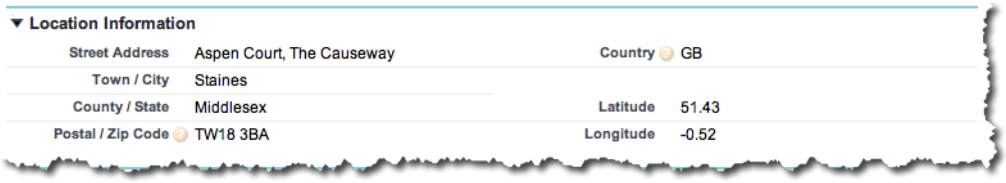


Figure 8.5 Sources – Location Information

Note

Note that for Passenger Transport and Freight Transport source record types only the Country field is required. The other location fields can be exposed and recorded if required.

The remaining fields are specific to source record types. Some of these fields are applicable to multiple source record types and are therefore repeated in the relevant section for completeness.

Electricity Metered Resources

This source record type is used to define a metered electricity source. This type of meter can be either a primary fiscal meter or a sub-meter (which should be defined as having a parent fiscal meter).

Meter Details

Supply Type: Select the supply type from the choices available. The source will then be flagged as either a 'Core' source or a 'Residual' source for the purposes of a UK CRC disclosure.

Core / Residual: This field is automatically completed as it is driven by the selection made for the 'Supply type' field. This information is important for a UK CRC disclosure.

MPAN Core: The Meter Point Administration Number (also known as the S-Number) is a unique identifier for all electricity meters. The core number is 13 digits long (the first 2 digits identify the distributor, the next 8 digits are the meters unique identifier and the last 3 digits are check digits). This information is required for a CRC disclosure.

MPAN Supplementary: The supplementary MPAN information comprises a 2-digit profile type, 3-digit meter time-switch code and a 3-digit line loss factor.

Meter Serial Number: The serial number of the meter.

Meter Type: Choose whether the meter is a main fiscal meter or a secondary sub or clip-on meter. Only fiscal meters will be included in disclosures.

Parent Meter: If the meter type is a sub meter or a clip-on meter, you should enter the Parent fiscal meter.

Provider: Enter the name of the Provider (i.e. the Electricity Supplier). Clicking the search icon next to the field name will open a lookup window enabling a search of the available Provider names. Linking sources to providers will enable reporting and analysis by provider.

Note

Note that providers must be defined prior to this step in order to be able to pick them here. See Providers in the General Administration section of this guide for details on defining and updating provider reference data.

AMR: Indicate whether this meter is classed as a non-mandatory Automatic Meter Reading device. Where the Supply type is defined as GB 00 (HH Metered) the AMR field should be recorded as N/A as this type of supply is a mandatory half hourly meter. (This field is used to calculate the UK CRC Early Action Metric).

Default Reading Type: The Default Reading Type will be applied to all source item records where a value has not been supplied. Estimated readings will be subject to 10% emissions uplift for UK CRC Disclosures.

Estimation Technique: For meters that have estimated readings, select the technique that has been used to estimate the energy bill.

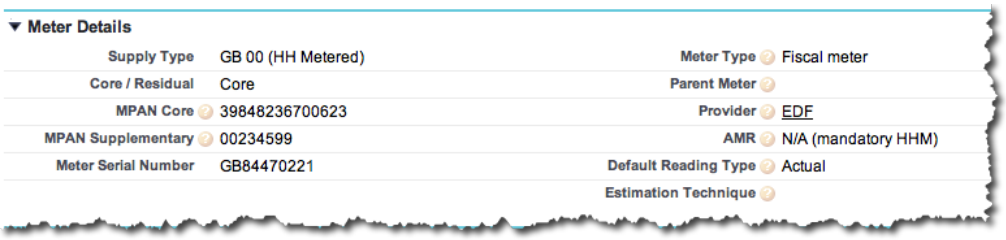


Figure 8.6 Sources – Meter Details

Supplementary Information

CCA: Indicate whether this source is covered under a Climate Change Agreement (CCA). This information will be used to calculate CCA exclusions for UK CRC disclosures.

EU-ETS: Indicate whether this source is covered under a European Union Emissions Trading Scheme (EU-ETS). This information will be used to calculate regulated emissions for UK CRC Disclosures.

ROCs/FIT: Indicate whether this source is from on-site renewables where Renewables Obligation Certificates (ROCs) or Feed-in Tariffs (FIT) are being claimed.

Figure 8.7 Sources – Supplementary Information

Gas Metered Resources

This source record type is used to define a metered gas source. This type of meter can be either a primary fiscal meter or a sub-meter (which should be defined as having a parent fiscal meter).

Meter Details

Supply Type: Select the supply type from the choices available. The source will then be flagged as either a 'Core' source or a 'Residual' source for the purposes of a UK CRC disclosure.

Core / Residual: This field is automatically completed as it is driven by the selection made for the 'Supply type' field. This information is important for a UK CRC disclosure.

MPAN Core: Enter the Meter Point Reference Number (MPRN) into this field as MPAN and MPRN are often used interchangeably for gas meters. An MPRN is an 11-digit number (the first 2 digits identify the system operator, the next 8 digits are the meters unique identifier and the last digit is a check digit).

Meter Serial Number: The serial number of the meter.

Meter Type: Choose whether the meter is a main fiscal meter or a secondary sub or clip-on meter. Only fiscal meters will be included in disclosures.

Parent Meter: If the meter type is a sub meter or a clip-on meter then enter the Parent fiscal meter.

Provider: Enter the name of the Provider (i.e. the Gas Supplier). Clicking the search icon next to the field name will open a lookup window enabling a search of the available Provider names. Linking sources to providers will enable reporting and analysis by provider.

AMR: Indicate whether this meter is a non-mandatory Automatic Meter Reading meter (this field is used to calculate the UK CRC Early Action Metric).

Default Reading Type: The Default Reading Type will be applied to all source item records where a value has not been supplied. Estimated readings will be subject to 10% emissions uplift for UK CRC Disclosures.

Estimation Technique: For meters that have estimated readings, select the technique that has been used to estimate the energy bill.

Supplementary Information

CCA: Indicate whether this source is covered under a Climate Change Agreement (CCA). This information will be used to calculate CCA exclusions for UK CRC disclosures.

EU-ETS: Indicate whether this source is covered under a European Union Emissions Trading Scheme (EU-ETS). This information will be used to calculate regulated emissions for UK CRC Disclosures.

Other Metered Resources

This source record type is used to define metered sources that are not electricity or gas meters. This record type should be used for water meters or any other type of metered resource.

Meter Details

Supply Type: Select the supply type from the choices available. The source will then be flagged as either 'Residual' or 'none'.

Core / Residual: This field is automatically completed as it is driven by the selection made for the 'Supply type' field.

Meter Serial Number: The serial number of the meter.

Meter Type: Choose whether the meter is a main fiscal meter or a secondary sub or clip-on meter. Only fiscal meters will be included in disclosures.

Parent Meter: If the meter type is a sub meter or a clip-on meter then enter the Parent fiscal meter.

Provider: Enter the name of the Provider (i.e. the Supplier). Clicking the search icon next to the field name will open a lookup window enabling a search of the available Provider names. Linking sources to providers will enable reporting and analysis by provider.

Default Reading Type: The Default Reading Type will be applied to all source item records where a value has not been supplied.

Estimation Technique: For sources that have estimated readings, select the technique that has been used to estimate the bill.

Non-Metered Resources

This source record type is used to define a source that is not metered. This record type should be used for unmetered fuels e.g. diesel used for generators.

Supplementary Information

Default Reading Type: The Default Reading Type will be applied to all source item records where a value has not been supplied.

Estimation Technique: For sources that have estimated readings, select the technique that has been used to estimate the bill.

Provider: Enter the name of the Provider (i.e. the Supplier). Clicking the search icon next to the field name will open a lookup window enabling a search of the available Provider names. Linking sources to providers will enable reporting and analysis by provider.

Passenger Transport

This source record type is used to define a source that contains details of passenger transport journeys. This record type should be used to record details of employee business expenses and other similar passenger transport details.

Freight Transport

This source record type is used to define a source that contains details of freight transport journeys.

Note

Note that there are no additional Passenger transport or Freight transport specific fields beyond the common set of fields described earlier in this section.

Waste Disposal

This source record type is used to define waste that is being disposed of. This record type should be used for all methods of waste disposal e.g. to landfill, recycling, energy from waste (EfW), compositing etc.

Supplementary Information

Provider: Enter the name of the Provider (i.e. the Disposal Service Provider). Clicking the search icon next to the field name will open a lookup window enabling a search of the available Provider names. Linking sources to providers will enable reporting and analysis by provider.

Importing Source Item Data

Once you have established a source you are ready to import the individual data items (records) for this source. For example if the source is an Electricity or Gas meter then the source item data will be a record of the individual meter readings for that source. The application provides a level of flexibility regarding the granularity of the records (source items) that can be stored. The individual source items could be half hourly, daily, weekly or monthly readings. Which level of granularity you choose to use will be governed by the level supplied by your provider, your reporting requirements and/or data storage volume/cost restrictions.

Whilst it is possible to enter source item data into the application via the UI (by clicking the **New Source Item** button) this is not the recommended approach for anything beyond low volumes as source item data volumes are usually substantial. In addition a simple data entry module (EasyCapture) for non-technical users is available. EasyCapture is a separately licenced module for the CloudApps Sustainability Suite. Use of a data import tool that is able to import external data files in CSV (Comma Separated Values) format is recommended. The first row of the data file should contain field names that match the field name labels displayed in the application.

Important

Data Import is a function that can only be performed by the System Administrator (not the CloudApps Sustainability Administrator). See Appendix A (Data Import Tools & Recommendation) for details on how to install and access the data import tools along with recommendations on which tools to use in which circumstances.

The following fields are the recommended set (not all are mandatory and some have default values available) which are necessary to successfully enter or import source item data:

Inputs

Inventory Event: The event selected will govern the processing of the source item into an appropriate inventory or inventories based on the posting rules contained in the agreement that is associated with the source.

Source Key: Uniquely identifies the type of source item and the unit of measurement (with its corresponding emissions factors for all 6 Kyoto protocol gasses). If a Default Source Key has been added to the parent Source and no value is provided for the source item, then the default key entered on the source will be used for the source item. The source key is used to tag the source item with type and sub-typing information as well as calculating the appropriate GHG emissions if the source item is a GHG emissions source item.

Note

Note that Source Keys are case sensitive and all custom keys will have '__c' appended to their name.

Amount: The amount, recorded in the unit identified by the key.

Amount Type: Indicate whether the amount being entered is an Actual or Estimated amount.

Date & Time: The date and time the amount was used/consumed/acquired etc.

End Date: Typically only required for source items that cover periods of time other than a week, a day or half an hour e.g. a monthly water or waste disposal bill.

Duration: Entering the duration of time covered by the source item (in days or fractions of a day) will assist in determining the calculated duration of time that the source item covers. If a Start and an End date have been specified then entering duration is not necessary.

Reading Type: Indicate the type of reading for this source item (typically only used for metered sources). In most cases the reading type will be either Actual or Estimated. TBD readings will need to be resolved before Disclosures can be accurately reported. Estimated readings will be subject to 10% emissions uplift for UK CRC Disclosures.

Total Cost: Entering the cost (actual or estimated) will enable the financial costs to be rolled up and summarised on Performance Periods

Cost Type: Indicate whether the cost entered is an Actual or Estimated cost. Selecting 'Calculated' in this field will populate the total cost field with a calculated value based on the unit cost held on the Source Key.

Note

Note that 'Amount', 'Date & Time' and 'Source Key' are mandatory fields. When importing data via the Import Wizard 'record type' is not a required column in your data file. For data loads via external tools the record type will need to be specified as a column in the data file. This 'record type' column must contain the record type ID (not the name), which will need to be determined by the System Administrator or the CloudApps Sustainability Administrator.

The following section describes each of the source item record types.

Source Item Record Types

When manually creating Source Item records via the UI you will be required to pick the Source Item Record type. The section shows the screen listing these record types and is followed by a detailed description of each.

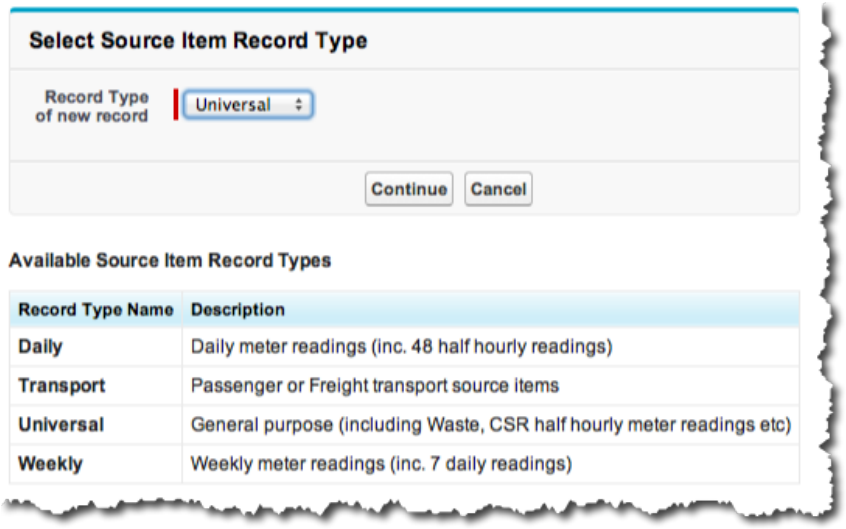


Figure 8.8 Source Items – Selecting the Source Item Record Type

Universal

Pick this source item record type for all general-purpose source items including Social and Economic source items and waste disposal. This record type should also be used for source items that consist of individual half hourly meter readings i.e. one record for each half hour. Other uses of this record type include use for non-metered resources or for meter reading periods that are longer in duration than a week. *The mandatory fields required in the data file used for this source item record type are 'Source', 'Date & Time', 'Source Key' and 'Amount'*.

Daily

Pick this source item record type when the source data consists of individual daily meter readings. When choosing this record type, 48 additional fields are optionally available for population with the half hourly meter readings for the relevant day if they are available. *The mandatory fields required in the data file used for this source item record type are 'Source', 'Date & Time', 'Source Key' and 'Amount'. The 48 optional fields are '00:30', '01:00', '01:30' '02:00', 02:30' and so on, through to '00:00'. If these values are created as text fields in your data file then the Import Wizard will automatically match them to the appropriate fields in the application at load time.*

Weekly

Pick this source item record type when the source data consists of individual weekly meter readings. When choosing this record type, 7 additional fields are available for population with daily meter readings for the relevant week if they are available. *The mandatory fields required in the data file used for this source item record type are 'Source', 'Date & Time', 'Source Key' and 'Amount'. The 7 additional fields are 'Monday', 'Tuesday', 'Wednesday', 'Thursday' 'Friday', 'Saturday' and 'Sunday'.*

Transport

Pick this record type when the source data consists of either passenger transport or freight transport source item data. *The mandatory fields required in the data file used for this source item record type are 'Source', 'Date & Time', 'Source Key' and 'Amount'*.

Having successfully imported your source item data you should notice that all the source items have now had their GHG emissions calculated (where appropriate) using the appropriate emission factors associated with the source key chosen for each source data item. Other categorisation information will also be recorded against the source item to assist in typing and sub-typing the data and in identifying the origin of the information.

(Information) Disclosures

Disclosures Overview

Information Disclosures are the mechanism for disclosing an organisation's GHG emissions to both regulatory and voluntary bodies. The scope and the type of information that needs to be disclosed will vary between the types of bodies that require the disclosure, however the process remains the same. This flexibility allows an organisation to capture their source emissions data once and then disclose it many ways. CloudApps Sustainability Suite supports information disclosures for the UK's Carbon Reduction Commitment Energy Reduction Scheme (CRC), the Investor Carbon Disclosure Project (CDP) 2010, 2011 & 2012 Information Requests and a general disclosure mechanism supporting end user defined output formats via templates (Microsoft Word, Excel & PowerPoint).

When creating an Information Disclosure the application takes a snapshot of the source information for a defined time period and specified criteria. This information is then sliced and diced in a way appropriate for the type of disclosure being made. In the case of CRC the information is than aggregated by Significant Group Undertaking (as required under the regulation) and functionality is provided to ensure that the CRC energy Efficiency Schemes 90% Rule is achieved before the disclosure is submitted.

The information is then formatted to produce each of the reports and data submissions required by the regulatory or voluntary body. After completing a submission the information that has been disclosed is recorded so that it becomes possible to refer back and see the specific information that was disclosed from any past information disclosure even if the underlying data has since changed.

Before creating an Information Disclosure the criteria that will be used to define the repeatable boundaries of the disclosure will need to be defined. This is achieved by means of a Disclosure Definition that is defined once and can then be used for multiple disclosures of the same type. This enables the same definition to then be consistently re-used over different time periods and for different disclosing organisations (if appropriate). Three additional factors also govern the boundaries of the information that are ultimately included or excluded from the actual disclosure. The first is the 'Do Not Disclose' flag that is included on each source. Any source that is flagged as 'Do Not Disclose' will be omitted from all information disclosure. Second is the Disclosing Organisation that is entered when the Disclosure is first created. Each source is tagged with it's 'Ultimate Disclosing Organisation' and this information is used to filter a disclosure by matching it against the Disclosing Organisation that is also specified at the time the Disclosure is first created. The third and final factor governing the boundary of each disclosure is the date range ('Date From' and 'Date To') that is entered and then used to filter which source item records will be included.

Two sample Disclosure Definitions have been provided in the application (for CRC and CDP). The CloudApps Sustainability Administrator can modify the ones that have been provided or create entirely new Disclosure Definitions. *See Disclosure Definitions in the General Administration section of this guide for details on defining and updating disclosure definitions.*

Disclosures Summary

When viewing an existing information disclosure the user is first presented with a summary page. All disclosures of the same type (i.e. CRC) and status (submitted or un-submitted) are grouped together and display on a chart. This allows the user to graphically see their history of submissions, or multiple draft submissions (un-submitted) side by side.

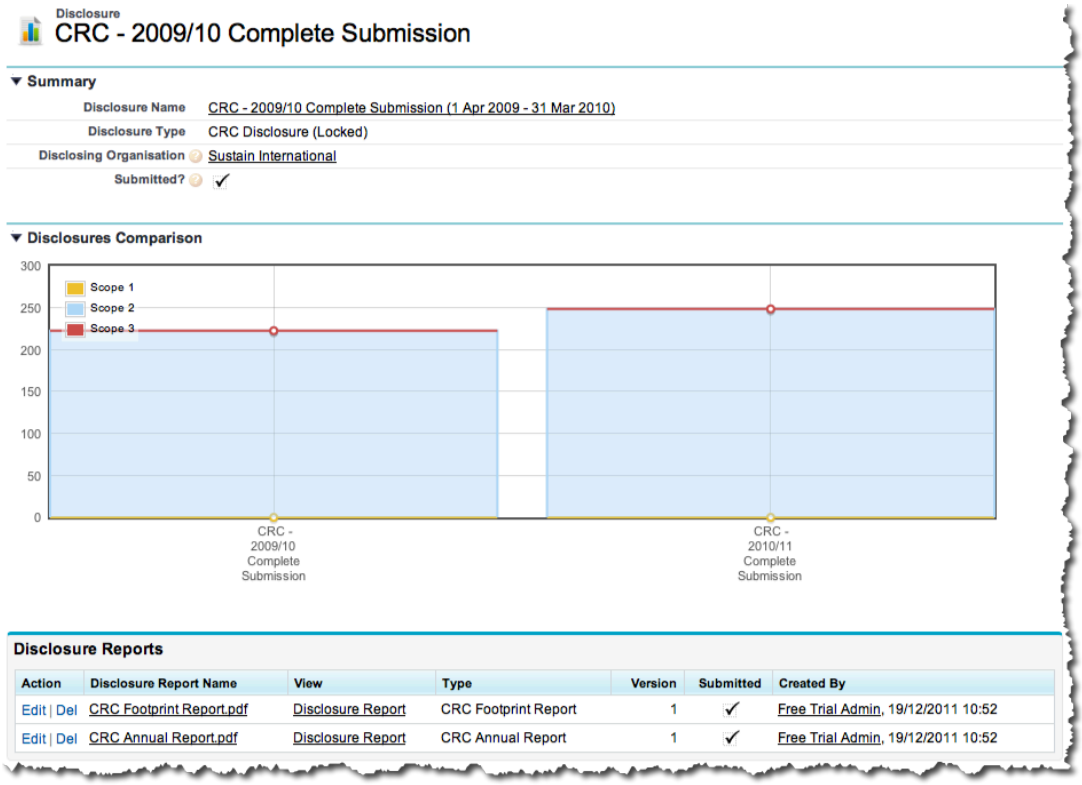


Figure 9.1 Disclosures - Summary

Clicking on the Disclosure name (which is a hyperlink) will take the user to the disclosure details page.

Defining and Calculating a Disclosure

There are several ways that you can define a new disclosure in the application:

1. From the Disclosures home page you can click on the **New** button (in the 'Recent Disclosures' area) to initiate the process for defining a new disclosure.

2. From any of the Disclosure views the **New Disclosure** button can be clicked to initiate the process for defining a new disclosure.

3. When viewing an existing disclosure from the disclosure detail page you can click on the **Clone** button. This will create a cloned copy of the currently viewed disclosure thus enabling you to make changes to the cloned copy and then save the modified information as a new disclosure.

When creating a new disclosure you will be required to select the Disclosure Record Type. The five available Disclosure Record Types are: 'CRC Disclosure', 'CDP 2012 Disclosure', 'General Disclosure', 'CDP 2010 Disclosure' and 'CDP 2011 Disclosure' (these last two are a legacy disclosure type that were used for the previous 2 years of CDP disclosure

reporting). After selecting the appropriate record type click on the **Continue** button. This will initiate the Disclosure Creation Wizard process. Follow this process to define the Disclosure (outlined below):

First Step: Give the disclosure a unique name, identify the disclosing organisation, select a disclosure definition to use and provide a description of the disclosure.

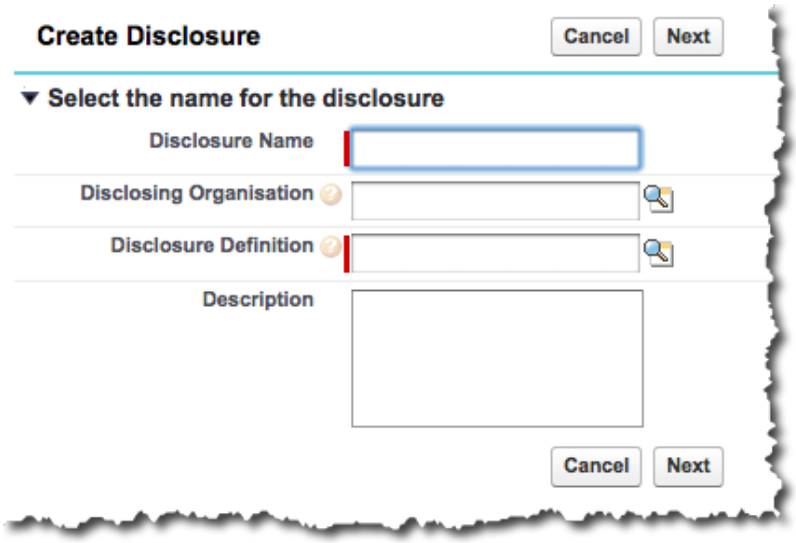


Figure 9.2 First step – Create Disclosure
(Naming the Disclosure and Selecting the Disclosure Definition)

Second Step: Select the data range for the disclosure. Only source item records that fall within the date range selected (and that meet the remainder of the disclosure criteria from the disclosure definition) will be included in this disclosure.

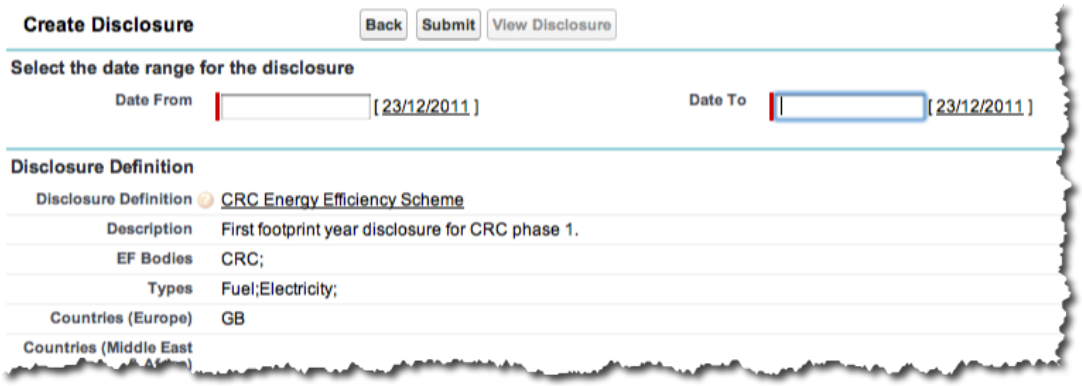


Figure 9.3 Second step – Create Disclosure (Defining the Date Range)

Third Step: Submit the disclosure for processing. Pressing the submit button will process your disclosure according the disclosure criteria defined in the preceding two steps. This is a background task that is typically performed in multiple 'batches' of work. The area below the disclosure definition summary titled Disclosure Engine will show the progress of this task.

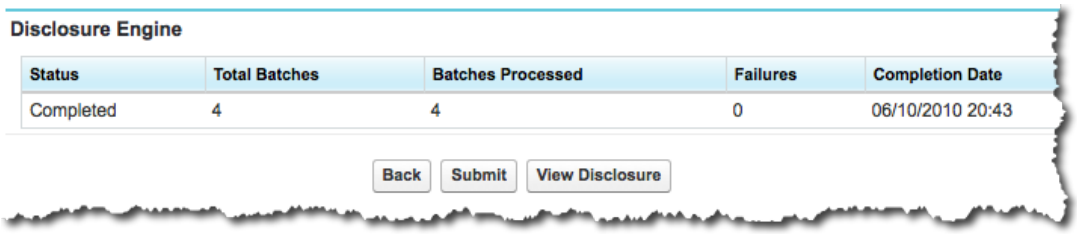


Figure 9.4 Third step – Create Disclosure (Submitting the Disclosure for Processing)

Once you see that the status is 'Completed' you are ready to view the disclosure (by clicking on the **View Disclosure** button).

Note

Note that the View Disclosure button will be greyed out until after you have submitted the disclosure for processing. If the process completes with failures you should log a Case with CloudApps (via the cloudapps.com support site) at support.cloudapps.com in order to determine the cause of the failure.

Common Disclosure Information

Once an information disclosure has been calculated it will contain the specific emissions details required for the type of disclosure that has been calculated. All Disclosure types will begin with the same two sections (Disclosure Detail & Disclosure Criteria). These sections summarise the information that was entered to describe the disclosure along with the criteria that is being used to define the boundaries of the disclosure.

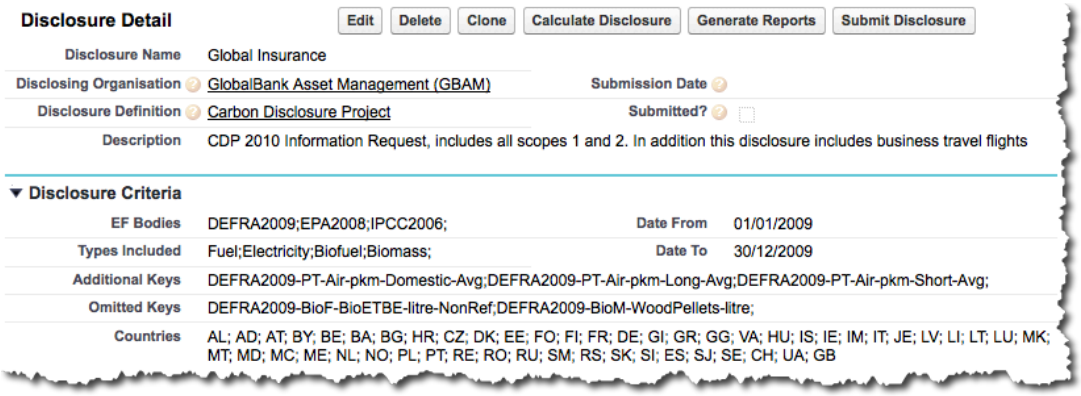


Figure 9.5 Disclosures - Common fields used across Disclosure types

The remainder of the screen layout and information are specific to the type of disclosure that has been generated. The following two sections therefore describe the three types of disclosures (CDP, CRC and General) that are currently supported.

CRC Energy Efficiency Scheme Disclosures

Completing a CRC information disclosure is a multi-step process. The first step is to calculate the disclosure, which collates together all the source information that meets the criteria in use for the disclosure. The second step is to augment the collated information with any additional information that is not contained within the application (e.g. details of excluded use electricity sources or CCA and EU-ETS sources not recorded in the

application). The third step is to ensure that the 90% rule has been achieved (and if not to then add in residual sources until the rule has been achieved). The final step is to generate the reports required to complete the online submission. The CRC specific sections displayed on the screen are summarised below (along with a description of the steps necessary to complete the CRC disclosure).

Calculated Disclosure Summary

The following display only fields provide details of the disclosures tCO2 emissions along with both the calculated percentage and the status of the 90% rule.

Total Footprint Emissions tCO2: This figure represents the organisations total emissions, minus any excluded use emissions (domestic accommodation, transport activities, supply not for own consumption and premises outside the UK), minus any CCA exempt group member's emissions.

Regulated (core) Emissions tCO2: These emissions are the total footprint emissions, minus any residual source emissions i.e. the total footprint's core emissions.

CRC Emissions tCO2: These emissions are the Regulated Emissions minus emissions covered under the CCA and/or EU-ETS regulations. In order to be valid, the 90% rule status field must be displaying 'Rule Achieved' i.e. the 90% rule Calculation must be greater than or equal to 90%.

90% Rule Status: This field will either indicate that the 90% Rule has been achieved or that additional residual sources need to be included within the disclosure in order for the rule calculation to be greater than or equal to 90%.

90% Rule Calculation: This field displays the percentage of qualifying emissions included in the disclosure. Qualifying emissions must represent >= 90% of the Total Footprint Emissions.

Residual Measurement List tCO2: The total residual emissions currently included in the disclosure.

Calculated Disclosure Summary
Total Footprint Emissions tCO2 18,568,269.33
Regulated (core) Emissions tCO2 17,216,894.33
CRC Emissions tCO2 15,973,522.78
90% Rule Status Rule Achieved
90% Rule Calculation 92.72%
Residual Measurement List tCO2 0.00

Figure 9.6 CRC Disclosures - Calculated Disclosure Summary

Early Action Metrics

The following display only fields display details of the supply and percentage coverage being achieved from the two CRC early action metrics: Automatic Meter Reading (AMR) coverage and Carbon Trust Standard (or equivalent) Scheme coverage.

CTS (or equivalent) Scheme tCO2: The quantity of tCO2 included in the disclosure that is covered by a Carbon Trust Standard (or equivalent) Scheme.

CTS (or equivalent) Scheme Coverage: The percentage of tCO2 emissions included in this disclosure that are covered by a CTS (or equivalent) Scheme.

Voluntary AMR Eligible Supply tCO2: The quantity of tCO2 emissions (included in the disclosure), which are eligible for the voluntarily installed AMR early action metric. Sources covered by Mandatory HHM's are not eligible for this early action metric.

Voluntary AMR Consumption tCO2: The quantity of tCO2 emissions (included in the disclosure) that are being measured by voluntarily installed AMR's.

Voluntary AMR Coverage: The percentage of emissions (included in the disclosure) that are covered by the AMR early action metric.

Figure 9.7 CRC Disclosures - Early Action Metrics

CRC Disclosure Information by Group

Disclosure Groups are used to aggregate information by Significant Group Undertaking and by Disclosing Organisation (i.e. the emissions of the Disclosing Organisation that are separate to the emissions of the SGU's). All sources should be associated with an organisation and it is this information that is then used to aggregate the emissions from sources underneath each Disclosing Group. To view details of the emissions from each Disclosing Group (along with the Disclosure sources associated to that Group) click on the Groups name (displayed as a hyperlink) in the Disclosure Groups related list.

The resulting Disclosure Group detail page contains all the information applicable to that individual group. The majority of this information has been calculated and is for display only, however there are three fields that can be edited. These fields are provided so that any additional electricity or emissions that have not already been recorded in the application can be summarised in order to ensure a complete CRC disclosure is made. The three additional fields are described below:

Additional Excluded Use kWh: Enter a manual adjustment to record any additional energy (electricity in kWh) that has been consumed for a CRC defined excluded use (domestic accommodation, transport activities, supply not for own consumption and premises outside the UK), but not recorded in the application as a Source.

Additional CCA Exempt tCO2: Enter a manual adjustment to record any additional emissions that are covered under a Climate Change Agreement (CCA), but are not recorded in the application as a Source.

Additional EU-ETS Exempt tCO2: Enter a manual adjustment to record any additional emissions that are covered under the European Union Emissions Trading Scheme (EU-ETS) regulations, but are not recorded in the application as a Source.

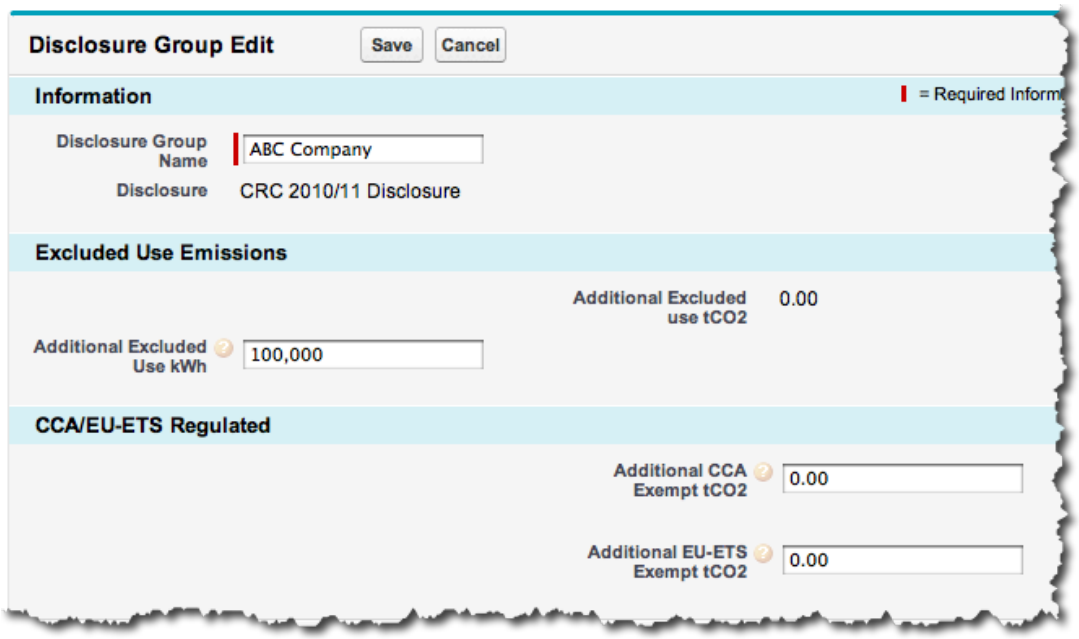


Figure 9.8 CRC Disclosure Groups - Manual adjustment fields (Edit Mode)

The remainder of the fields on the Disclosure Group page have been calculated by the application and are for display only. These fields are summarised below:

Information

Organisation Emissions tCO2: The total emissions for all Sources that are linked to this Disclosing Group and within the bounds of disclosure criteria.

Relevant Emissions tCO2: The Disclosing Groups organisation emissions, minus any excluded use emissions (domestic accommodation, transport activities, supply not for own consumption and premises outside the UK).

Regulated (core) Emissions tCO2: The Disclosing Groups core emissions that are regulated under CRC, CCA or EU-ETS regulations.

CRC Emissions tCO2: These emissions are the CRC regulated emissions only, i.e. Regulated core Emissions minus emissions covered under the CCA and/or EU-ETS regulations, plus any residual sources that have been flagged for inclusion in the disclosure.

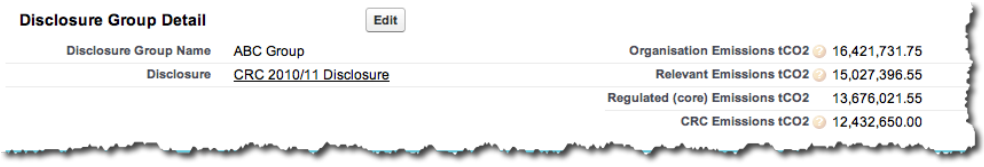


Figure 9.9 CRC Disclosure Groups – Summary Details

Excluded Use Emissions

Excluded Use tCO2: The rolled up total tCO2 that is recorded as deductible excluded use energy on the Disclosure Groups Disclosure Sources plus and Additional Excluded Use tCO2 recorded at the Disclosure Group level.

Additional Excluded Use tCO2: The tCO2 emissions that have been calculated using the Electricity grid rolling average (supplied in the disclosure definition) for the manual amount of additional excluded use kWh entered for the Disclosure Group.

Excluded Use Emissions
Excluded Use tCO2 1,144.80
Additional Excluded Use kWh 872,000
Additional Excluded use tCO2 471.26

Figure 9.10 CRC Disclosure Groups – Excluded Use Emissions

CCA / EU-ETS Regulated

The following display only fields display details of the Disclosure Groups CCA Exemption status along with the emissions that are regulated under Climate Change Agreements or the European Union's Emissions Trading Scheme.

CCA Exemption: Indicates (Yes/No) whether 25% or more of the emissions of the Disclosure Group are covered by a Climate Change Agreement (CCA).

CCA Coverage %: The percentage of emissions for the Disclosing Group that are covered by a Climate Change Agreement (CCA).

Total CCA Exempt tCO2: The total emissions, which are exempt from CRC as a consequence of being covered under Climate Change Agreements for the Disclosure Group. This total is the combination of CCA flagged emissions rolled up from the Disclosure Groups Sources plus the additional CCA exempt emissions manually added to the Disclosure Group.

Total EU-ETS Exempt tCO2: The total emissions, which are exempt from CRC as a consequence of being covered under the European Union's Emissions Trading Scheme for the Disclosure Group. This total is the combination of EU-ETS emissions rolled up from the Disclosure Groups Sources plus the additional EU-ETS exempt emissions manually added to the Disclosure Group.

Included CCA Exempt tCO2: This total is the combination of CCA flagged emissions rolled up from the Disclosure Groups Sources.

Included EU-ETS Exempt tCO2: This total is the combination of EU-ETS flagged emissions rolled up from the Disclosure Groups Sources.

CCA/EU-ETS Regulated
CCA Exemption Yes
Included CCA Exempt tCO2 12,432,650.00
CCA Coverage % 85.43%
Additional CCA Exempt tCO2 2,784,000.00
Total CCA Exempt tCO2 15,216,650.00
Included EU-ETS Exempt tCO2 106.55
Total EU-ETS Exempt tCO2 106.55
Additional EU-ETS Exempt tCO2 0.00

Figure 9.11 CRC Disclosure Groups – CCA/EU-ETS Regulated

Early Action Metrics

The following display only fields display details of the supply and coverage being achieved from the two CRC early action metrics for the Disclosure Group.

CTS (or equivalent) Scheme tCO2: The quantity of tCO2 from the Disclosure Group that is covered by a Carbon Trust Standard (or equivalent) Scheme.

Voluntary AMR Eligible Supply tCO2: The quantity of tCO2 emissions from the Disclosure Groups Sources, which are eligible for the voluntarily installed AMR early action metric.

Voluntary AMR Consumption tCO2: The quantity of tCO2 emissions from the Disclosure Groups Sources that are being measured by voluntarily installed AMR's.

Figure 9.12 CRC Disclosure Groups - Early Action Metrics

CRC Information by Disclosure Sources

Disclosure Sources summarise the Source information that meets the disclosure criteria. A summary of the Sources that have been included in the disclosure can be seen in the Disclosure Sources related list on the main Disclosure page. To view the details of each Disclosure Source click on the Disclosure Sources name (displayed as a hyperlink) in the Disclosure Sources related list.

The resulting Disclosure Source detail page contains all the information applicable to a disclosure of that Source. The majority of this information is for display only; however there is one field, which can be edited in order to record how much energy from an electricity source (meter) has been consumed for a CRC excluded use.

Excluded Use Emissions

Deductible Excluded Use kWh: Enter a manual adjustment to record the amount of energy (electricity in kWh) that has is to be deducted from this source as it has been consumed for a CRC defined excluded use (domestic accommodation, transport activities, supply not for own consumption and premises outside the UK).

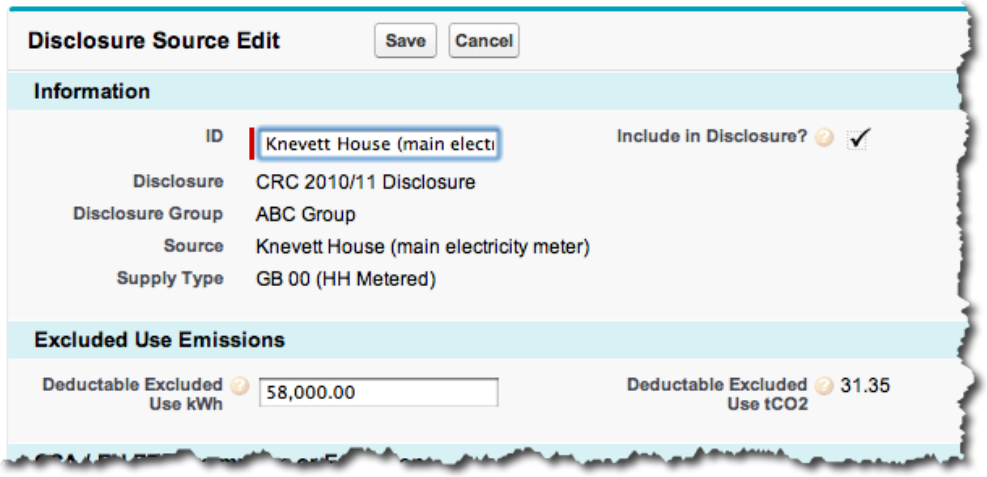


Figure 9.13 CRC Disclosure Sources - Manual adjustment field (Edit Mode)

Information

Supply type: The type of supply recorded on the original source.

Include in Disclosure: Sources with this box checked will be included in the CRC Disclosure. Some sources are automatically included, whilst others (Residual Sources) can be manually added to the disclosure by checking this box.

CRC Emission: Indicates (Yes, No) whether this source is currently included in the disclosure as a CRC emission.

Organisation Emissions tCO2: The Sources total tCO2 emissions (within the criteria of disclosure criteria).

Relevant Emissions tCO2: The Sources total tCO2 emissions, minus any excluded use emissions (domestic accommodation, transport activities, supply not for own consumption and premises outside the UK).

CRC Emissions tCO2: The Sources tCO2 emissions that are CRC regulated and included in the disclosure.

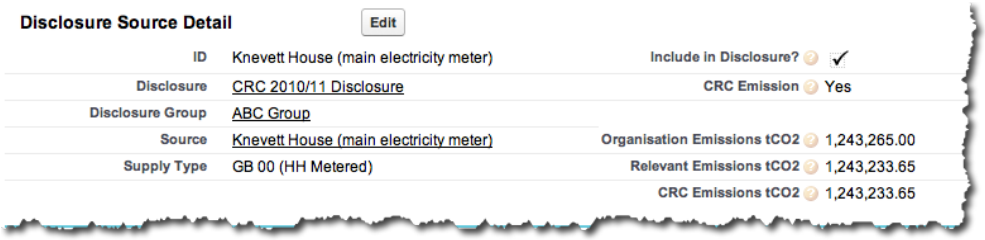


Figure 9.14 CRC Disclosure Sources – Summary Details

Excluded Use Emissions

Deductible Excluded Use tCO2: The tCO2 emissions that are to be deducted from this Source as they were consumed for a CRC excluded use. These emissions are calculated using the Electricity grid rolling average (supplied in the disclosure definition) from the manually entered Deductible Excluded Use kWh field.

Exclusion Adjusted MWh: The total MWh of energy for this source, which has been adjusted to take account of any manually entered adjustment for CRC excluded use energy consumption.

Figure 9.15 CRC Disclosure Sources – Excluded Use Energy & Emissions

Calculated Emissions

MWh: The total calculated energy in MWh for this source.

Total tCO2: The total calculated tCO2 emissions for this source.

Figure 9.16 CRC Disclosure Sources – Calculated Energy & Emissions

CCA / EU-ETS Exemption or Exclusion

CCA Exemption: Indicates (Yes, No) whether the source has a CCA Exemption applied to it as a consequence of its parent Disclosure Group having 25% or more of its emissions covered by a Climate Change Agreement (CCA).

CCA: Indicates (Yes, No) whether the source is regulated under a Climate Change Agreement and therefore to be excluded.

EU-ETS: Indicates (Yes, No) whether the source is regulated under the European Union Emissions Trading Scheme and therefore to be excluded.

Figure 9.17 CRC Disclosure Sources – CCA/EU-ETS Exemption or Exclusions

Early Action Metrics & Credits

CTS Certificated: Indicates (Yes, No) whether this source is covered under a CTS (or equivalent) Scheme. This information is determined from the Disclosing Group which is the level at which the scheme certificate is held.

AMR: Indicates (N/A, Yes, No) whether this source is fitted with an Automatic Meter Reading capability. Mandatory Half-hourly meters are flagged as Not Applicable (N/A) as they are not eligible for the CRC AMR Early Action Metric.

ROCs/FIT: Indicates (Yes, No) whether this source has a Renewables Obligation Certificate (ROC) or a Feed-In Tariff (FIT) associated with it.

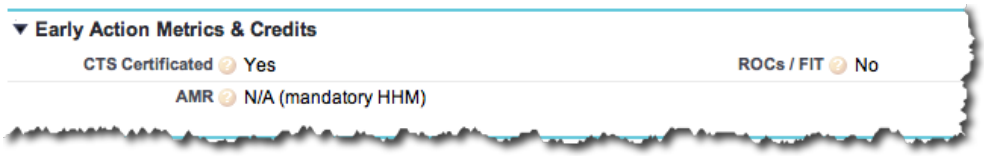


Figure 9.18 CRC Disclosure Sources – Early Action Metrics & Credits

Reading Details

Reading Type: This value is determined by the duration of different types of readings (typically for metered resources). Possible values are: (Actual, Estimated, TBD). If the duration of actual individual readings is less than 6 months, then all the emissions of the source will be flagged as estimated for this disclosure. Sources that are flagged as estimated will be subject to a 10% uplift that is applied under the regulations. Sources that re flagged as TBD (To Be Determined) must be resolved before they can be disclosed.

CRC Estimation Uplift tCO2: The uplifted amount tCO2 emissions that will be calculated for the source under the CRC regulations.

CRC Estimation Uplift MWh: The uplifted energy (in MWh) that will be calculated from the source under the CRC regulations.

Duration of Actual Readings: The number of days covered by actual readings for the source.

Duration of Estimated Readings: The number of days covered by estimated readings for the source.

Duration of TBD Readings: The number of days covered by estimated readings for the source.

Number of Source Item Records: This is a count of the number of individual source item records (from the source) that have been included in the calculated totals for the source. The date range that has been used for the disclosure governs this information.

Figure 9.19 CRC Disclosure Sources – Reading Details

Generating CRC Disclosure Reports

To generate disclosure reports click on the **Generate Reports** button. Performing this action will generate each of the reports required for the relevant information disclosure. These reports will be generated in the Adobe PDF file format and attached to the disclosure. Reports can be viewed from the Reports related list on the main disclosure page. Each report is versioned and the details of the person that created the report plus a date and time stamp are also recorded. Each report forms a snapshot in time of the information the disclosure contained at that point. Each time the **Generate Reports** button is clicked a new version of the reports will be generated based on the latest information contained in the disclosure at that time.

To view, extract or print a report click on the Disclosure Report hyperlink in the **View** column of the Disclosure reports related list. The reports are stored in Adobe pdf format so you will need a means of viewing PDF file format documents. The Adobe Reader can be downloaded for free from the adobe website (www.adobe.com).

CRC Disclosure Reports

The CRC Energy Efficiency Scheme currently requires two types of disclosure, each required at various points in time throughout the lifecycle of the scheme. To facilitate this, the UK Environment Agency provide an on-line electronic system (known as the CRC Registry) to facilitate the disclosure process. The CRC Registry is an on-line web application that does not provide an API; therefore each disclosing organisation will be required to enter their disclosure details directly into the CRC Registry. In order to simplify this process CloudApps Sustainability Suite provides reports laid out in the same order, as the information is required for entry into the on-line electronic web application.

The two types of disclosure currently required by the CRC Energy Efficiency Scheme are the Footprint Report and the Annual Report. These reports are described below:

CRC Footprint Report

This report provides the primary information required to disclose fuel supply data after the end of each CRC footprint year. In addition to providing the fuel supply data directly required by the on-line CRC Registry, the CloudApps Sustainability Suite Footprint Report provides CO2 emissions data. Emissions data is calculated by the CRC Registry and provided in this report as an informational cross check (as per the UK Environment Agency's recommended best practice guidance) The report is divided into the following five major sections:

CCA Organisation Review & Exemptions

This section provides the Participant and Significant Group Undertakings indicating whether they are claiming a CCA exemption and is so providing details of the percentage coverage and tCO2 emission for the exempt groups.

Report Metrics (Energy Supplies)

This section provides details of the core emissions (excluding CCA exempt SGU's or Participant) along with details of any other (non-core) fuels. Details are provided of the energy supplied (in its original unit of measure) along with the calculated tCO2 emissions.

Report Metrics (Emissions)

This section provides details of emissions that are covered by EU ETS and directly by CCA's. This information is broken out into core and non-core energy and also broken out to report emissions that are directly excluded or exempt because 25% or more of an SGU's total emission make all the emissions of that SGU exempt.

Residual Measurement List

This section lists out the amount of any residual non-core non EU ETS / CCA fuel sources (and emissions) that have been included in the submission to ensure that 90% of the footprint is disclosed.

Footprint Report Summary

This section summarises the footprint report, providing total footprint emissions along with total regulated emissions and the percentage of the footprint covered by regulated emissions.

CRC Annual Report

This report provides the primary information required to disclose fuel supply data after the end of each CRC annual reporting year. In addition to providing the fuel supply data directly required by the on-line CRC Registry, the CloudApps Sustainability Suite Annual Report provides CO2 emissions data. Emissions data is calculated by the CRC Registry and provided in this report as an informational cross check (as per the UK Environment Agency's recommended best practice guidance) The report is divided into the following five major sections:

Renewables

This section details the amount of electricity that has been generated and self-supplied, where a ROC/FIT subsidy has been received.

Report Metrics (Energy Supplies)

This section provides details of the core emissions (excluding CCA exempt SGU's or Participant) along with details of any other (non-core) fuels. Details are provided of the energy supplied (in its original unit of measure) along with the calculated tCO2 emissions.

Subsidiary Emissions

This section details the total emissions for the organisation and for each significant Group Undertaking.

Early Action Metrics

This section provides details of the percentage coverage for either the Carbon Trust (or equivalent) Scheme and for the Automated Meter Reading (AMR) early action metrics.

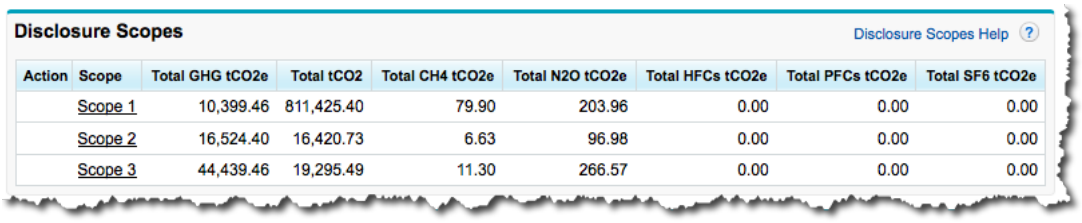
CDP (Carbon Disclosure Project) Disclosures

The Investor CDP 2012 Information Request contains three sections. The first two sections (Management, Risks & Opportunities – questions 1 to 6) require descriptive and checkbox answers rather than specific emissions calculations. These sections are not therefore calculated by the application. The section of the CDP information request that requires the submission of emissions information is the section titled: Emissions (questions 7 to 15). Within this section the application calculates and reports answers for the following questions: 7.4, 8.1, 8.2, 8.3, 8.8a, 9.1a, 9.2a, 9.2b, 9.2c, 10.1a, 10.2a, 10.2b, 12.2, 12.3 and 15.1.

The answers required for these questions can be viewed through the screens described below or by generating the CDP 2012 information disclosure report. This report is laid out in the same format as the information request document in order to simplify data entry into the CDP 2012 Online Response System (ORS).

CDP Disclosure Information by Scope

Below the Disclosure Criteria on the Disclosure page is a related list of information. This list sub-divides the disclosure information by scope and is labelled **Disclosure Scopes**. At this level you will be able to review the emissions by scope and by GHG. Drilling into an individual scope record (by clicking on the Scope name) will take you to a further level of detail for the selected scope, including a breakdown of the emissions by various dimensions (described below).



Disclosure Scopes — Disclosure Scopes Help

Action	Scope	Total GHG tCO2e	Total tCO2	Total CH4 tCO2e	Total N2O tCO2e	Total HFCs tCO2e	Total PFCs tCO2e	Total SF6 tCO2e
	Scope 1	10,399.46	811,425.40	79.90	203.96	0.00	0.00	0.00
	Scope 2	16,524.40	16,420.73	6.63	96.98	0.00	0.00	0.00
	Scope 3	44,439.46	19,295.49	11.30	266.57	0.00	0.00	0.00

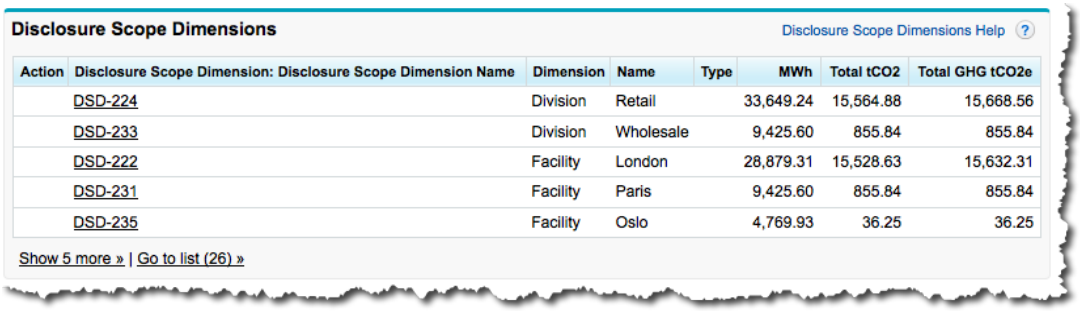
Figure 9.20 CDP Disclosure – Disclosure Scopes (Related List)

CDP Disclosure Information by Dimension

After drilling down into the Disclosure Scope detail page for an individual scope you are presented with a Total GHG emissions summary including a breakdown of the individual gasses and gas groups. Below the emissions summary is a related list displaying the disclosure dimensions that have been calculated for scope in question.

Disclosure Scope Dimensions provide the mechanism for further breaking down emissions that are by scope into various additional dimensions. The dimensions supported are as follows: Category dimensions (Geography, Facility, Business Division & Usage), Emission

dimensions (Type, SubType & Emissions Factor Key). These dimensions are then used by the report generation engine to segment the emissions information out into the individual answers required for the 2010 CDP information disclosure report.



Disclosure Scope Dimensions — Disclosure Scope Dimensions Help

Action	Disclosure Scope Dimension: Disclosure Scope Dimension Name	Dimension	Name	Type	MWh	Total tCO2	Total GHG tCO2e
	DSD-224	Division	Retail		33,649.24	15,564.88	15,668.56
	DSD-233	Division	Wholesale		9,425.60	855.84	855.84
	DSD-222	Facility	London		28,879.31	15,528.63	15,632.31
	DSD-231	Facility	Paris		9,425.60	855.84	855.84
	DSD-235	Facility	Oslo		4,769.93	36.25	36.25

Show 5 more » | Go to list (26) »

Figure 9.21 CDP Disclosure – Disclosure Scope Dimensions (Related List)

Generating CDP Disclosure Reports

To generate disclosure reports click on the **Generate Reports** button. Performing this action will generate each of the reports required for the relevant information disclosure. These reports will be generated in the Adobe PDF file format and attached to the disclosure. Reports can be viewed from the Reports related list on the main disclosure page. Each report is versioned and the details of the person that created the report plus a date and time stamp are also recorded. Each report forms a snapshot in time of the information the disclosure contained at that point. Each time the **Generate Reports** button is clicked a new version of the report will be generated based on the latest information contained in the disclosure at that time.

To view, extract or print a report click on the Disclosure Report hyperlink in the **View** column of the Disclosure reports related list. The reports are stored in Adobe pdf format so you will need a means of viewing PDF file format documents. The Adobe Reader can be downloaded for free from the adobe website (www.adobe.com).

CDP Disclosure Report

The most effective way of viewing the disclosure information required for a CDP submission is to generate the CDP information disclosure report. Answers are provided for the following questions. Values provided by the CloudApps Sustainability Suite application are displayed in red on the report.

7. Emissions Methodology

Answer 7.3 can be found in the Global Warming Potentials (GWP) section of this user guide. Click here to view the GWP's used by the standard Emission Factor Keys available with the application.

Answer 7.4 lists the emissions factors applied and their origin (note that emissions factors are expressed in kgCO2e per MWh).

8. Emissions Data

Answer 8.2 provides gross global Scope 1 emissions (metric tonnes CO2e)

Answer 8.3 provides gross global Scope 2 emissions (metric tonnes CO2e)

Answer 8.8a provides emissions from Biologically Sequestered Carbon i.e. from burning Biofuel/Biomass (metric tonnes CO2e)

9. Scope 1 Emissions Breakdown

Answer 9.1a Scope 1 emissions sources by geography (metric tonnes CO2e)
Answer 9.2a Scope 1 emissions sources by business division (metric tonnes CO2e)
Answer 9.2b Scope 1 emissions sources by facility (metric tonnes CO2e)
Answer 9.2c Scope 1 emissions sources by GHG type

10. Scope 2 Emissions Breakdown

Answer 10.1a Scope 2 emissions sources by geography (metric tonnes CO2e)
Answer 10.2a Scope 2 emissions sources by business division (metric tonnes CO2e)
Answer 10.2b Scope 1 emissions sources by facility (metric tonnes CO2e)

12. Energy

Answer 12.2 states how much fuel, electricity, heat, steam and cooling in MWh has been consumed by your organisation during the reporting year.
Answer 12.3 breaks down the total fuel figure (in Q12.2) by fuel type in MWh

15. Scope 3 Emissions

Answer 15.1 provides data on sources of Scope 3 emissions relevant to your organisation (metric tonnes CO2e)

General Disclosures

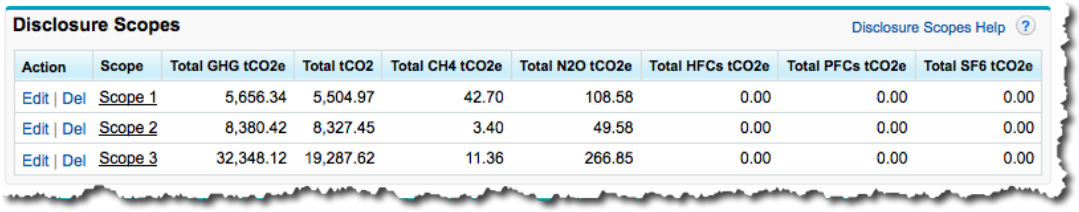
General Disclosures calculate GHG emissions by scope in the same way as CDP disclosures. Within each scope the emissions are then further divided into a number of dimensions. These dimensions allow for reporting by all categories, by emission type and also by individual emissions factor keys. The purpose of providing a General disclosure is to provide flexibility in the reporting of GHG emissions. Instead of having a pre-defined output report in a specific regulatory or voluntary disclosure format, general disclosures provide the means for organisations to define their own output format via templates. In this way it is possible for each organisation to better meet their specific needs for GHG emissions disclosure.

In order to deliver this capability CloudApps have teamed up with AppExtremes, producers of Conga Composer, a tool for producing sophisticated user defined documents and reports in multiple formats. Conga Composer must be licensed directly from AppExtremes and can be purchased directly from the AppExchange by clicking here. A free 30 day trial version is available for download should you wish to try out this functionality before deciding to purchase. For instructions on how to create a button to launch Conga Composer from within the General Disclosures page please see the Conga Composer Post Installation Steps in the CloudApps Sustainability suite Installation Guide.

Once installed and configured users will be able to define their own reports and documents by merging data from the general disclosure into Word, Excel, PowerPoint or PDF templates. The resulting reports and documents can then be stored back into CloudApps Sustainability Suite and held as an attachment to the disclosure. These reports can either be stored in their original format (the format of the template i.e. Word, Excel or PowerPoint) or be automatically converted to PDF for broad cross platform compatibility.

General Disclosure Information by Scope

Below the Disclosure Criteria on the Disclosure page is a related list of information. This list sub-divides the disclosure information by scope and is labelled **Disclosure Scopes**. At this level you will be able to review the emissions by scope and by greenhouse gas. Drilling into an individual scope record (by clicking on the Scope name) will take you to a further level of detail for the selected scope, including a breakdown of the emissions by various dimensions (described below).



Disclosure Scopes — Disclosure Scopes Help

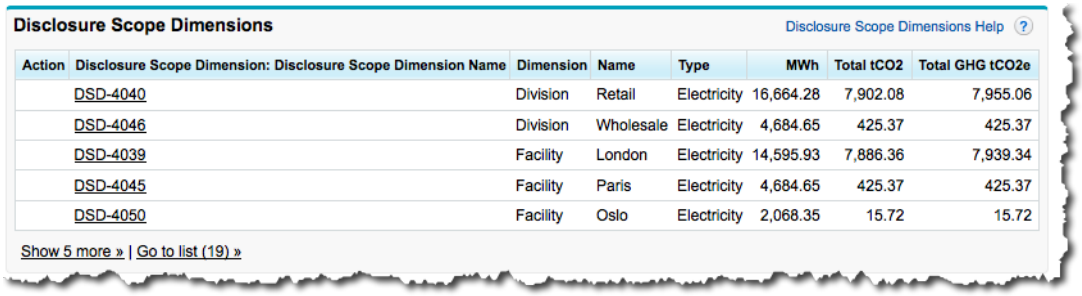
Action	Scope	Total GHG tCO2e	Total tCO2	Total CH4 tCO2e	Total N2O tCO2e	Total HFCs tCO2e	Total PFCs tCO2e	Total SF6 tCO2e
Edit | Del	Scope 1	5,656.34	5,504.97	42.70	108.58	0.00	0.00	0.00
Edit | Del	Scope 2	8,380.42	8,327.45	3.40	49.58	0.00	0.00	0.00
Edit | Del	Scope 3	32,348.12	19,287.62	11.36	266.85	0.00	0.00	0.00

Figure 9.22 General Disclosure – Disclosure Scopes (Related List)

General Disclosure Information by Dimension

After drilling down into the Disclosure Scope detail page for an individual scope you are presented with a Total GHG emissions summary including a breakdown of the individual gasses and gas groups. Below the emissions summary is a related list displaying the disclosure dimensions that have been calculated for scope in question.

Disclosure Scope Dimensions provide the mechanism for further breaking down emissions that are by scope into various additional dimensions. The dimensions supported are as follows: Category dimensions (Geography, Facility, Business Division & Usage), Emission dimensions (Type, SubType & Emissions Factor Key).



Disclosure Scope Dimensions — Disclosure Scope Dimensions Help

Action	Disclosure Scope Dimension: Disclosure Scope Dimension Name	Dimension	Name	Type	MWh	Total tCO2	Total GHG tCO2e
	DSD-4040	Division	Retail	Electricity	16,664.28	7,902.08	7,955.06
	DSD-4046	Division	Wholesale	Electricity	4,684.65	425.37	425.37
	DSD-4039	Facility	London	Electricity	14,595.93	7,886.36	7,939.34
	DSD-4045	Facility	Paris	Electricity	4,684.65	425.37	425.37
	DSD-4050	Facility	Oslo	Electricity	2,068.35	15.72	15.72

Show 5 more » | Go to list (19) »

Figure 9.23 General Disclosure – Disclosure Scope Dimensions (Related List)

General Disclosure Reports

Provided the optional Conga Composer application has been installed and configured you will then be able to create document templates using Microsoft Word, Excel or PowerPoint. The data calculated for your general disclosure can then be merged with the templates to produce a report.

Specific instructions on using Conga Composer are provided by AppExtremes in their user documentation for Conga Composer. Once created templates can be stored either within the platform used by CloudApps Sustainability Suite or on your local computer. Having selected the template you wish to use, next decide if you wish to save the report as an attachment to the Disclosure. If this is required then the '***Automatic Logging***' check box

must be selected and the 'Attach File' field should read '***Attach only, No Task Record***'. Both of these options are contained within the Log Activity Options box of the Composer window. Reports are generated in real time and can be output and viewed in either their native format (the same as the template) or in Adobe Acrobat (PDF format) by selecting the appropriate option in the Merge Options box. Having decided the output format you are now ready to click the **Merge** button, which will then merge the data from the disclosure into the template and generate the report. Additional options are also available such as the ability to email the report to people directly from within the application.

Reports that have been saved back into the general disclosure will be accessible in the Notes & Attachments related list on the general disclosure page. These reports will be stored in the format specified in the merge options box of the Composer window.

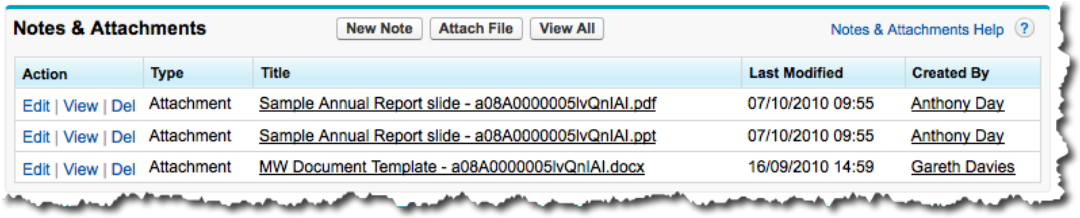


Figure 9.24 General Disclosure – Notes & Attachments (Related List)

Submitting a Disclosure

Once a disclosure has been submitted to the relevant regulatory or voluntary body the Disclosure must be closed off and locked so that no further changes can be made. This is necessary to ensure an audit trail is maintained which contains an accurate record of the information that was disclosed.

To lock the Disclosure from further changes and to flag the version of report(s) that were used for the disclosure submission click the **Submit Disclosure** button. You will then be prompted to enter the submission date, which is the date that your submission was made. The final step is to then click the Submit button to lock the disclosure and flag it as having been submitted. The most recent version of the disclosure report(s) will now also be flagged as submitted.

(Sustainability) Goals

Goals Overview

Goals are where the overall Sustainability Goals for your organisation are setup, baselined, monitored and maintained. Goals can be defined for anything that is being measured in an inventory. Goals can be measured in absolute terms e.g. the total kWh of Electricity used or measured against a KPI e.g. the tonnes of CO2e emitted from Business travel per Employee (FTE). Goals can be setup over long periods of time i.e. multiple years with budgets and targets being established and then measured against. Lastly these budgets and targets can be allocated out into the organisation to specific Performance Centres helping to ensure the alignment of performance against overall organisational goals from the individual performance centres of the business.

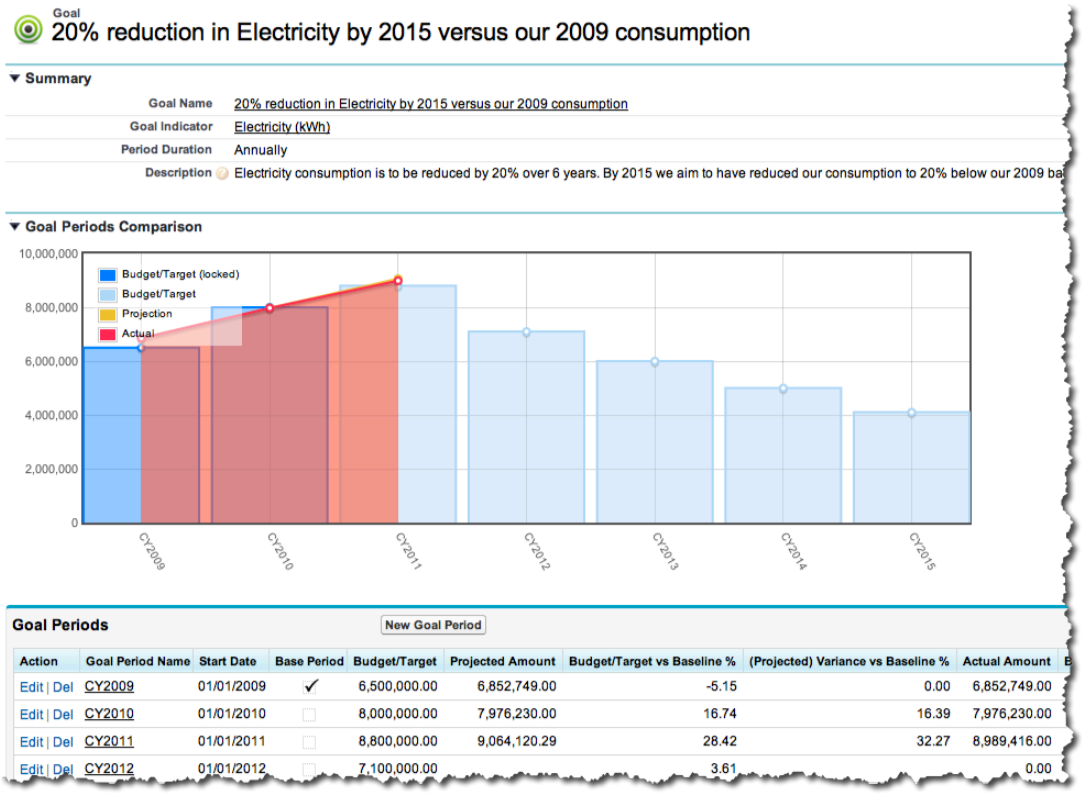


Figure 10.1 Goals – Goal Summary

Viewing Goals

After selecting the Goals tab you will be presented with the Goals home page with either the most recently viewed, created or modified goals being displayed (if there are any). From here you can view a list of goals by clicking on the **Go** button displayed alongside the View picklist. Selecting 'All' in the view picklist will display all Goals. Additional views (that filter the Goal list) may also be available and these can also be selected here.

To view and/or edit an individual goal click on the goal name which is a hyperlink and will be underlined. Performing this action will take you to a summary page for that individual goal. From here you will be able to view a summary chart showing the goals performance against past budgets/targets, a projection of performance for the current period over its entire duration of the goal. Also displayed in two related lists below the chart are more

detail comparisons of the goal performance for each period along with the goal allocations (percentage allocations of the budgets/targets out to Performance Centres). To view full details of the goal, click on the goal name hyperlink. This will then display the goal details page containing full details of the goal along with its associated goal periods and goal allocations.

Defining a Goal

Defining a goal is relatively straightforward and the generation of the individual Goal Periods that the goal duration will span has been automated. The Administrator simply needs to enter the minimum required set of information along with the goals start and end dates. Saving the goal will then generate the appropriate goal periods for that data range.

There are several ways that you can define a new goal in the application:

1. From the Goals home page clicking on the **New** button (in the 'Recent Goals' area) will initiate the process for defining a new goal.

2. From any view (only the All view is provided by default) you can click the **New Goal** button to initiate the process of defining a new goal.

3. When viewing an existing goal from the goal detail page you can click the **Clone** button. This will create a cloned copy of the currently viewed goal thus enabling you to make changes to the cloned copy and then save the modified information as a new goal.

The following information describes the fields that should be entered when creating a new goal. Note that some fields are display only and have been indicated as such.

Information

Goal Name: Enter a short descriptive name (in 80 characters or less) that describes the objectives of the goal and which will serve as a name or reference to the goal.

Boundary: Organisations change over time as they divest and acquire parts of their organisation. When making performance comparisons against a base period it is important to ensure that subsequent periods are measured on the same basis. Boundaries provide the mechanism for ensuring this. Sources are related to Organisations and Boundaries are a collection of organisations (and in some cases percentage ownership of an organisation are also taken into account i.e. for Joint Ventures). Enter the boundary name or use the lookup capability to select the appropriate boundary for this goal.

Note

Boundaries must be defined prior to this step in order to be able to enter them here. See Boundaries in the General Administration section of this guide for further details.

Description: Use this field to provide a more complete and full description of the goal. The information entered here is available to employees looking to better understand the goal; it's objectives and the benefits to the organisation.

Published: Use this field to decide if the goal should be visible to the users of external applications such as SuMo Employee Engagement application.

Indicator Details

Inventory: Specify the Inventory on which this goal is to be based (a lookup facility is provided). All calculations of actual performance for each period will be derived from this inventory for the specified boundary. The Unit of Measure for the goal will be the same unit of measure as used by the selected inventory.

Intensity Unit: If this goal is to be measured using a Key Performance Indicator then this field should be used to select the intensity unit that will be used for the KPI. A picklist has been provided for a common number of intensity units (the Sustainability Suite Administrator can extend this list if required).

Unit of Measure: **[DISPLAY ONLY]** This field displays the unit of measure that has been derived for the goal. This will either be the measurement unit defined for the inventory or the measurement unit of the inventory divided by the intensity unit (if one has been specified i.e. for goals that are to be measured using a KPI).

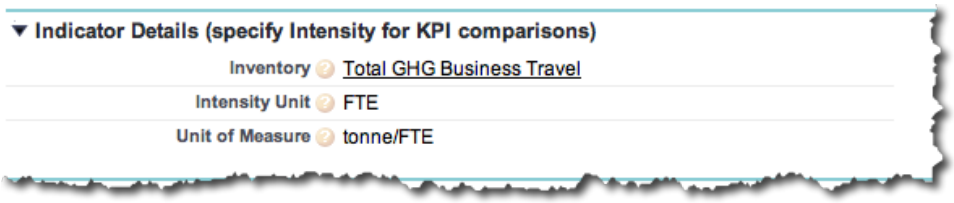


Figure 10.2 Goals – Indicator Details

Goal Period Definition

Goal Period Duration: Use this picklist to specify the length of each goal period. Durations can be Annual, Quarterly or Monthly.

Important

If KPI's are to be used it is important to ensure that the goal period duration and the Performance Period durations are defined to be the same. CloudApps also recommends that Goal Period durations should not be shorter than Performance Periods durations for linked Goals (linked via Goal Allocations). In addition CloudApps also strongly recommends that the default Goal Period duration should be annual unless it is specifically necessary to monitor and set budgets/ targets for a shorter duration.

Goal Start Date: Enter the date that the first period is to begin with. This date should preferably be aligned to the start of a period.

Goal End Date: Enter the end date for the last period of the goal.

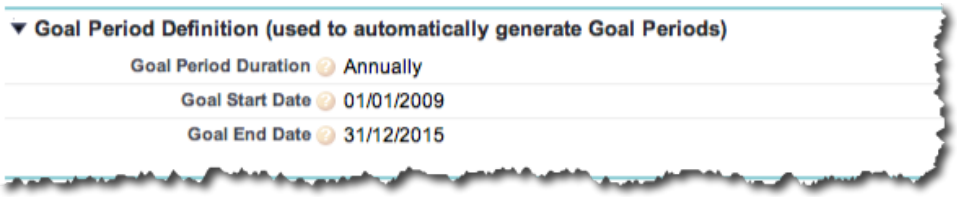


Figure 10.3 Goals – Goal Period Definition

Note

The start and End dates for the goal will be used to automatically generate the Goal Periods using the Goal period duration that has been defined in combination with the organisation wide period basis that has been specified in the application settings.

Baseline Details

Baseline Amount (Absolute): **[DISPLAY ONLY]** The Goal Processing Engine will calculate this figure when the Sustainability Administrator runs the *Baseline Calculation* function. A Goal Period must first have been flagged as being the *Base Period* (see the Goal Periods section below for further details).

Baseline Intensity Value: **[DISPLAY ONLY]** This figure will be picked up from the Goal Period that has been flagged as the *Base Period* for the goal and entered against the goal when the *Baseline Calculation* function is run.

Baseline Amount: **[DISPLAY ONLY]** This is the calculated baseline amount with the baseline intensity factor applied (if one is available).

Goal Periods

Goal Periods are automatically created by the system based on a specified start and end date along with the goal period duration and the application setting for the period basis (i.e. a Calendar, Fiscal or Disclosure) plus the start month specified if the period basis is either Fiscal or Disclosure. Either a CY (Calendar Year), FY (Fiscal Year) or DY (Disclosure Year) prefix will be added to the year contained in the period name. Quarters will be indicated as Q1, Q2, Q3 or Q4. Months will be indicated using a three letter English abbreviation i.e. JAN, FEB, MAR etc.

Note

The year displayed in the Goal Period Name for both Fiscal and Disclosure Periods are based on year in the start month of the period. Thus a period which runs from September 2010 to August 2011 will be named FY2010.

Updating Goal Periods

After the goal periods have been automatically generated they are available for update. The primary purpose of manually updating the goal periods is to specify a budget/target and to enter an intensity value for the intensity unit if a goal is being monitored and

measured against a KPI. In addition to this one period should be flagged as being the base period for the goal.

The following three fields are therefore the only ones that can be edited by the user. The remainder are either auto generated or automatically updated when the Goal Processing Engine calculates period totals (this operation can be performed manually by the Sustainability Administrator, or scheduled for periodic calculation).

Base Period: Use this field to designate one of the goal periods as being the Base Period for the goal. When the baseline calculation is performed the goal itself will be updated with detail of the base periods absolute amount and also the intensity value (if applicable).

Budget/Target (Absolute): Enter the budget/target for this period as an absolute amount i.e. not an amount per intensity unit (if one has been defined).

Note

Budgets/Targets can also be defined by dragging the light blue bars on the goal periods comparison chart. Budgets from previous periods can only be edited via the field on the record. Numbers will be rounded for convenience.

Intensity Value: If the goal in question has been set up to use a KPI, use this field to enter the intensity value for unit specified in the intensity unit field. Doing so will enable performance comparisons via the KPI for each period.

A number of display only fields are provided for each goal period allowing a detailed analysis of each period's performance against the baseline, the budget/target and the projected performance. The most commonly referenced fields are provided in the Goal Period related list on the Goal summary page. A description of each of these fields is provided below:

Start Date: The first day of the period.

End Date: The last day of the period.

Budget/Target: The budget (for reduction goals) or target (for increase goals) displayed after the KPI intensity value has been applied (if applicable).

Projected Amount: For the current period the projected amount will be displayed. The projected amount is calculated by dividing the actual amount by the number of days into the period to date, then multiplying the result by the total number of days the period contains. The figure is displayed with the KPI intensity value applied (if applicable). Note that for past periods the projected amount will be no different to the actual amount.

Budget/Target vs Baseline %: This field displays the budget/target for the period compared against the baseline amount, expressed as a percentage. Many goals are expressed in terms of a desired percentage increase or reduction against an amount in the base period. This field displays the difference between the budget/target that is being set for the period against the baseline amount and is useful for setting budgets/targets in incrementally on the way to achieving the desired goal.

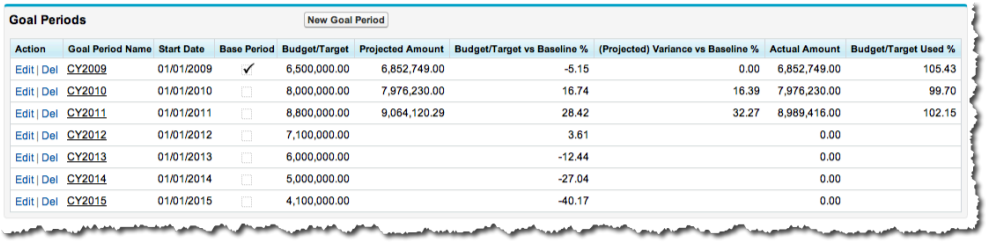
(Projected) Variance vs Baseline %: Similar to the Budget/Target vs Baseline % this field displays the variance between the projected amount for the current

period and the baseline amount, expressed as a percentage. Note that for past periods the projected amount will be no different to the actual amount and therefore the projected variance is the same as the actual variance.

Actual Amount: The actual amount calculated from the inventory for the period, displayed after the KPI intensity value has been applied (if applicable).

Budget/Target Used %: This is the percentage of the budget/target that has been used within the period.

In the example screen shot below we can see that the base period is CY2009 and that Budgets have been set with the intention of achieving a 40% reduction by 2015. However we can also see that for 2010 and 2011 consumption continued to rise, but beginning in 2012 the budgets begin to fall consistently. 2013 is the first year where a budget is being set below 2009 levels (12.44%).



Goal Periods New Goal Period

Action	Goal Period Name	Start Date	Base Period	Budget/Target	Projected Amount	Budget/Target vs Baseline %	(Projected) Variance vs Baseline %	Actual Amount	Budget/Target Used %
Edit | Del	CY2009	01/01/2009	✓	6,500,000.00	6,852,749.00	-5.15	0.00	6,852,749.00	105.43
Edit | Del	CY2010	01/01/2010		8,000,000.00	7,976,230.00	16.74	16.39	7,976,230.00	99.70
Edit | Del	CY2011	01/01/2011		8,800,000.00	9,064,120.29	28.42	32.27	8,989,416.00	102.15
Edit | Del	CY2012	01/01/2012		7,100,000.00		3.61		0.00	
Edit | Del	CY2013	01/01/2013		6,000,000.00		-12.44		0.00	
Edit | Del	CY2014	01/01/2014		5,000,000.00		-27.04		0.00	
Edit | Del	CY2015	01/01/2015		4,100,000.00		-40.17		0.00	

Figure 10.4 Goals – Goal Period Related List

Goal Allocations

Where budgets/targets have been defined for each goal period the application provides a capability of allocating these budgets out to the organisation in alignment with the way the business is being operated and run i.e. into Performance Centres.

Each goal allocation is specified for an individual performance centre as a percentage of the total. As Performance Centres are typically arranged in a hierarchy the allocation percentages should take this into account such that 100% of the budget/target is allocated to each level of the hierarchy. The application allows for budgets to be over allocated should you wish to provide for a margin of safety if budgets are not fully achieved.

Goal Allocations New Goal Allocation

Action	Goal Allocation: Goal Allocation ID	Centre Name	% Allocation	Active
Edit | Del	GA-000006	Sustain International	100.0	✓
Edit | Del	GA-000007	Sales - Australia	2.0	✓
Edit | Del	GA-000010	Sales - Germany	17.0	✓
Edit | Del	GA-000011	Sales - France	8.0	✓
Edit | Del	GA-000008	Sales - West Coast	40.0	✓
Edit | Del	GA-000009	Sales - UK	30.0	✓
Edit | Del	GA-000012	Sales - EMEA	59.0	✓
Edit | Del	GA-000075	Sustain Sales	95.0	✓

Figure 10.5 Goals – Goal Allocations

Performance (Centres)

Performance Centres Overview

Performance Centres are the means of allocating information captured in inventories into structures that can be aligned to the units of responsibility within an organisation. Gas and Electricity meters are typically located in buildings that are used by multiple departments and product lines. As such it is difficult to assign ownership and apportion emissions and costs out to the business owners. Business travel is typically recorded in an expense management application without GHG emissions being calculated and without individual employees being measured against those emissions. Without this level of alignment and ownership it is difficult to change behaviours and thus reduce costs, consumption of natural resources, GHG emissions or to increase CSR measures such a volunteer hours, charitable donations fund raising activities etc.

Apportioning inventory amounts and costs into performance centres deals with this problem in an effective way, for example by allowing the GHG emissions from inventories (in turn derived from sources) to be allocated out to all the departments that share a common building and therefore potentially a common set of electricity, gas and water meters. This mechanism is extremely flexible in that it allows inventory costs and amounts to be apportioned to one or more performance centres in any percentage. For example, costs and GHG emissions from gas, electricity, business travel, freight transport, water consumption and waste disposal can all be allocated in varying percentages to a country, department, product line or even an individual employee. In addition the application also supports overlapping performance centres that allow for the definition of multiple 'business views' of an organisation.

In order to aid comparison both between performance centres and across periods of time within a centre, CloudApps Sustainability Suite implements performance periods. Each performance centre is defined as having a period duration i.e. annual, quarterly or monthly. In addition when this period starts (or it's basis) can also be defined once for the whole organisation) so that it follows for example a calendar year, a fiscal year or even a disclosure year (to align with regulatory disclosure periods). Within a performance period each inventory that is being allocated to the performance centre results in a performance indicator. Each performance indicator contains multiple metrics in order to aid management and comparison. Amounts & costs for the individual performance period along with a rollup from descendent performance centres are all included and projected for the current period. Budgets/targets can be defined (or allocated from overall goals), and key performance indicator intensities can be entered to display information by the same KPI that is used on the associated organisational goal.

Viewing Performance Centres

After selecting the Performance tab you will be presented with a period centric home page view of performance centres. From here you can quickly switch between the current annual, quarterly or monthly list of performance centres using the calendar icons displayed along the top right hand edge of the performance centres list. Only the period durations that are available will be displayed i.e. if you do not have any monthly performance periods the icon for selecting monthly periods will not be available. The default view is defined in the application settings using the '**Default Period View (Performance Centres)**' picklist in the period settings section of the page.

To view a list of performance centres that contain a specific period select the period from the View picklist and click on the **Go** button. Selecting 'No Periods' in the view picklist will display only the performance centres that do not currently contain any performance periods.

To view and/or edit an individual performance centre click on the performance centre name which is a hyperlink. Performing this action will take you to a detail page for that individual performance centre.

Note

Note that from this list you can also drill directly to a specific performance period for a given performance centre. To do this click on the performance period which is also a hyperlink. Performing this action will take you to a summary page for that performance period. Further details on viewing a performance period see the Viewing Performance Periods section.

From here you will be able to view details of the selected performance centre and its position in a hierarchy. Below this in the related lists section you will see a list of descendent performance centres, performance periods, source allocations, goal allocations plus any Notes & Attachments that you have created for the performance centre.

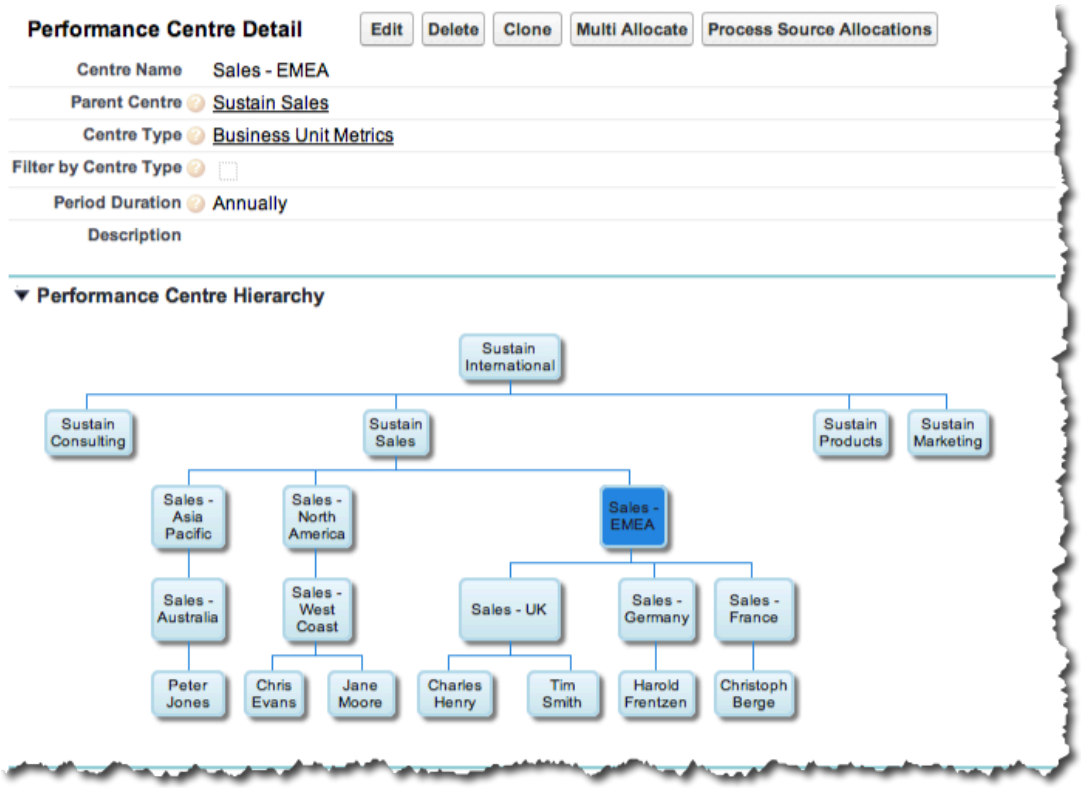


Figure 11.1 Performance - High Level Information

Defining a Performance Centre

The minimum information that should to be defined for each performance centre is its name, the period duration and the centre type. However it is recommended that for each performance centre you define as much additional information as makes sense as will be useful for reporting and performance centre comparisons.

There are several ways that you can define a new performance centre in the application:

1. Clicking on the Performance tab will display the performance centre home page. From here you will be presented with the default period view defined in application settings. Clicking on the **New Performance Centre** button will initiate the process for defining a new performance centre.

2. When viewing an existing performance centre from the performance centre detail page you can click the **Clone** button. This will create a cloned copy of the currently viewed performance centre thus enabling you to make changes to the cloned copy and then save the modified information as a new performance centre.

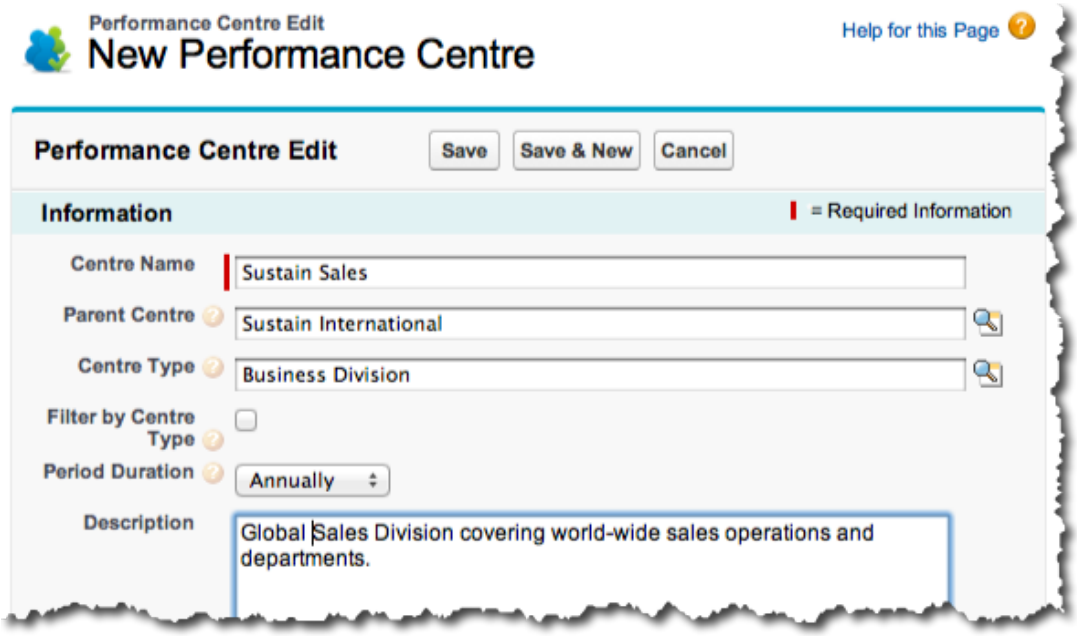


Figure 11.2 Performance - New Performance Centre Edit Screen

The following information describes the fields that should be entered when creating a new performance centre.

Information

Centre Name: Define a name that uniquely identifies this performance centre. Performance centres can cover something as large as a whole company or as small as an employee. This name will appear in your reports and dashboards.

Parent Centre: Click the search icon next to the field in order to select this performance centres parent centre. Doing so will place the performance centre within a hierarchy of centres which is required for the rollup of performance indicator amounts and costs.

Note

Note that the parent centre must have been defined prior to this step in order to be able to pick it here. The maximum number of levels supported in a hierarchy is five.

Centre Type: Performance centres may be of different types and these can be used to better categorise the centres scope and coverage as well as controlling the performance indicators that appear of the different types of centres if filtering by centre type is selected (see below).

Filter by Centre Type: Controlling the performance indicators that are displayed on a performance centre can be controlled by the centre type. Selecting this option will ensure that only the performance indicators that have been specifically associated with the centre type will be displayed.

Period Duration: Pick the length of the performance period. Consistency across performance centres is recommended so that comparisons can be performed. If KPI's are to be used on performance indicators then the period duration selected should be the same duration as is used for the associated goal (i.e. the goal that is based on the same inventory as the performance indicator).

Description: Use this field to provide a full description of the performance centre and the areas it covers.

Performance Periods

The Source Allocation Engine automatically creates periods as it processes Source Allocations. Using a combination of the application setting for the period basis plus the period duration of the performance centre with information from the source allocations and the Inventories they are associated with, the Source Allocation engine will create the necessary periods. These periods are then populated with appropriate performance indicators, as well as calculating the amount and cost for that performance centre and a rollup from its descendent performance centres for the same period.

Viewing Performance Periods

A performance period can be viewed directly from the Performance tab. After selecting the Performance tab you will be presented with a period centric home page view of performance centres.

To view a list of performance centres for a specific period select the desired period from the View picklist and click on the **Go** button. To view a specific period of an individual performance centre click on the performance period (after the performance centre name) which is a hyperlink. Performing this action will take you to a summary page for the requested period of the appropriate performance centre.

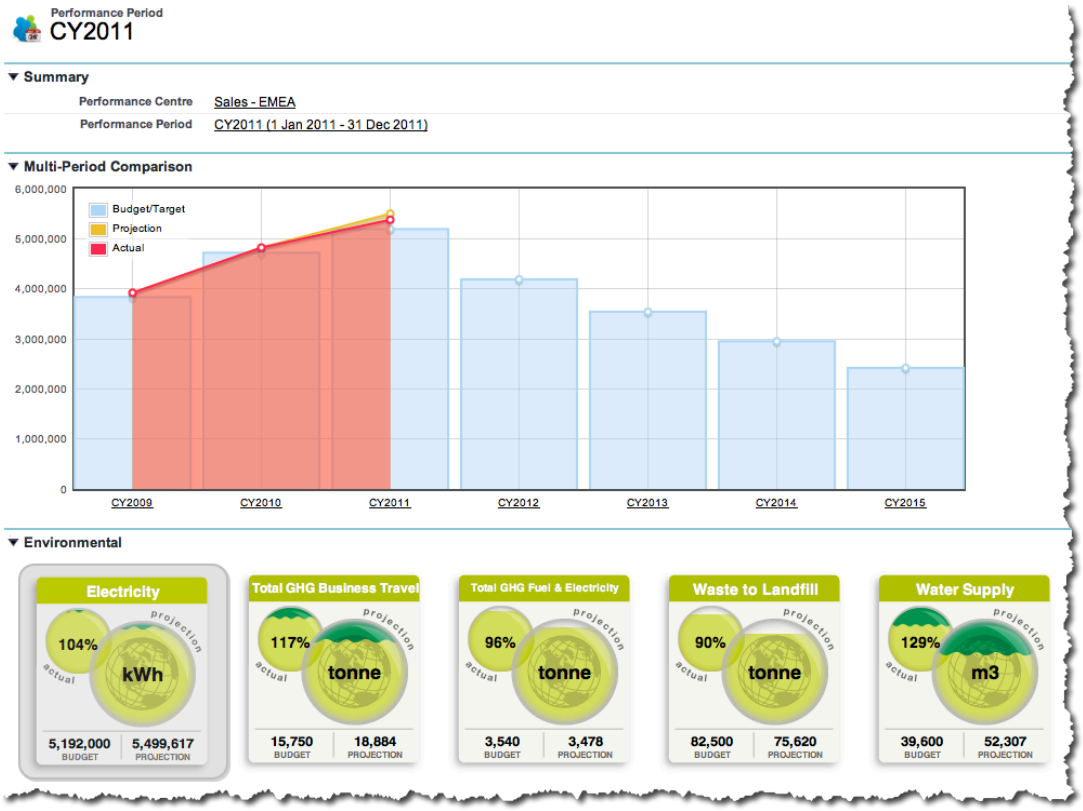


Figure 11.3 Performance – Period Summary

The multi-period comparison chart that is initially displayed will be for the first performance indicator in the list (indicated via a grey box outline). To view the appropriate chart for any of the other performance indicators click on the relevant indicators InfoGraphic display (but not on it's title as this will drill through to the details of the performance indicator – see details below).

From the performance period summary page containing the multi-period comparison chart it is possible to move between periods by simply drilling on the appropriate performance period label along the bottom of the cart (which is a hyperlink).

Performance Indicators

Performance indictors are generated for each inventory that is to be monitored within the boundaries of a performance centre. Performance indicators are categorised into three types: Environment, Social or Economic indicators. As indicators sit within a period and within a performance centre they are primarily providing information for a specific inventory within the specific period for the performance centre in question.

Viewing Performance Indicators

The overall performance of an indicator can be viewed on the performance period summary screen. Below the multi-period comparison chart a series of InfoGraphics (one for each indicator) show values for the budget/target, the projected amount (projected to the end of the period). The smaller '*actual*' sphere displays the actual amount of budget/ target that has been used expressed as a visual and numerical percentage. The larger '*projected*' sphere displays the projected amount compared to the budget/target as a visual percentage along with the unit of measurement being used for the indicator.

Note

Within the InfoGraphic percentages are graphically displayed by filling each sphere with colour from the bottom (imagine a coloured liquid in a clear spherical container). Thus 50% is represented when the sphere is half full and 75% when it is three quarters full (using the appropriate colour). A fully single coloured sphere indicates 100%. Percentages above 100%, up to 200% are represented by with a darker shade of the colour over spilling from the top of the sphere back down the outside, thus the top half of the sphere being darkly coloured represents 150%.

The full set of detailed information available for each Performance Indicator can be viewed by clicking on the indicators label displayed on the top coloured bar of each indicator. When you mouse over the label it will change to a hyperlink indicating that it can be clicked in order to drill into the details. Doing so will take you to the performance indicator detail page.

Editing a Performance Indicator

Most fields on the performance indicator are calculated and as such display only. The Sustainability Administrator can edit the following fields: *InfoGraphic*, *Period Budget/ Target* and *Intensity Value*, although the *Period Budget/Target* can also be set by the system if Goals and Goal Allocations have been defined (as these will allocate out a percentage of the overall organisational goal to each performance centre.

Information

Indicator Name: The name of the performance indicator matches the name of the Inventory on which it is based.

Performance Period: This is the period that the indicator belongs to and to which the information it contains relates.

Goal Period: This is the goal period that the indicator is related to. Any budgets/ targets that have been allocated from the goal will have come from this goal period.

Inventory: The Inventory on which the indicator is based.

Inventory Unit: The unit of measurement for the indicator. All amounts displayed on the indicator are represented in this unit of measure (but not costs which will be in the currency defined for the organisation).

InfoGraphic: When checked the InfoGraphic will be displayed on the period summary page (this is the default value). If the performance indicator is not required on the period summary page, uncheck this box.

Current Period: Indicates whether the Performance Indicator is within the current period by either displaying 'Yes' or 'No'. This information is useful for reporting and/or the allocation of rewards for SuMo users being measured on their current performance.

Figure 11.4 Performance – Indicator Information

Threshold Details

Threshold Type: This field will indicate the type of threshold that is being measured against. This is derived from the associated inventories reduction/ growth objective. If the objective is to the amounts in the associated inventory i.e. to increase volunteer hours then the Indicator will display the value 'Target'. If the objective is to reduce the amounts being measured in the associated inventory i.e. to reduce Carbon emissions then the Indicator threshold will display 'Budget'.

Threshold Amount: The threshold amount is the budget or target amount (depending on the threshold type) against which the indicator performance will be measured. Once entered (or allocated from an associated Goal and Goal Period) the relevant percentages for actual and projected attainment will be calculated and displayed on the InfoGraphic and multi-period comparison charts. Note that this value does not need to be manually entered if it has been allocated via a goal for the same inventory and period.

Threshold Percentage: This is the percentage of the budget or target (depending on the threshold type) that has been used in the period to date.

Figure 11.5 Performance – Indicator Threshold Details

Period Totals

Amount (This Level): The amount that has been calculated for this performance centre in this period from the appropriate inventory.

Amount (Descendants): The amount that has been calculated for all the descendants below this performance centre in this period.

Total Amount (Roll-Up): The combined amount for this level plus the calculated amount for all descendants below this performance centre in this period.

Cost (This Level): The cost that has been calculated for this performance centre in this period from the appropriate inventory.

Cost (Descendants): The cost that has been calculated for all the descendants below this performance centre in this period.

Total Cost (Roll-Up): The total combined cost for this level plus the calculated costs for all descendants below this performance centre in this period.

Figure 11.6 Performance - Indicator Period Totals

In-Period Projections

Projected Amount: The projected amount that has been calculated for this performance centre in this period from the appropriate inventory. The projection is calculated by dividing the total rolled-up amount by the number of days into the period and then multiplying the result by the total number of days that the period contains.

Projected Percentage: The projected amount expressed as a percentage of the period budget/total.

Projected Variance from Threshold Amount: The variance between the projected amount and the threshold amount expressed in the inventory unit. A positive number represents the projected amount above the budget or target (negative the projected amount below budget or target).

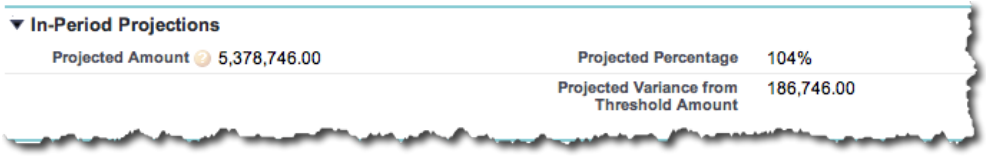


Figure 11.7 Performance – Indicator In-Period Projections

Lifetime (multi-period cumulative) Totals

Cumulative Amount (Roll-Up): The combined amount for this level plus the calculated amount for all descendants below this performance centre for this period and all past periods (i.e. the lifetime of the data contained in the inventory).

Cumulative Cost (Roll-Up): The total combined cost for this level plus the calculated costs for all descendants below this performance centre for this period and all past periods (i.e. the lifetime of the data contained in the inventory).

Figure 11.8 Performance – Indicator Lifetime (multi-period cumulative) Totals

Key Performance Indicator (KPI)

Where an organisational Goal that is measured using a KPI has been defined for an Inventory on which a Performance Indicator is based, the intensity unit will be displayed in this section. Specifying an intensity value for the performance centre will calculate the KPI in the inventory unit of measure divided by the intensity (KPI) unit.

Intensity Unit: The KPI intensity unit that has been specified for the organisational goal for the inventory that the performance indicator is based on.

Intensity Value: When a Performance Indicator is linked to a Goal that is in turn measured using a KPI the intensity value of the KPI for this performance centre in this period should be entered. This will enable the KPI value to be calculated.

Unit of Measure: The KPI unit of measure i.e. the inventory unit divided by the intensity (KPI) unit.

KPI Value: The calculated KPI value i.e. the Total Amount (Roll-Up) divided by the Intensity value that has been entered.

Figure 11.9 Performance – Indicator KPI

(Sustainability) Initiatives

Initiatives Overview

Two types of initiates are supported. The first, reduction initiatives, are a means of reducing an organisation's impact on the environment and reducing costs (i.e. associated with energy purchases, business travel, waste disposal etc). Each reduction initiative targets a different area of energy, fuel or resource savings that result in reduced GHG emissions (and cost).

The second, CSR initiatives, typically seek to improve an organisations corporate social responsibility. Typical CSR initiatives would target increases in employee volunteering, increases in charitable donations and an increase in fair trade transactions, increasing the number of electric company cars etc.

The anticipated savings from implementing reductions initiatives should also be taken into account when forecasting the number of carbon allowances that are required to be purchased in future years (applicable to UK CRC Energy Efficiency Scheme participants).

CloudApps Sustainability Suite provides a mechanism for assessing the benefits, costs and values of implementing reductions programs via the calculation and display of a Marginal Abatement Cost Curve (MACC) for your organisation's selected reductions initiatives.

Viewing Initiatives

Clicking on the **Initiatives** tab displays a list of your organisations initiatives along with a Marginal Abatement Cost Curve (for displaying selected reductions initiatives). Clicking on the name of an initiative (which is a hyperlink) will take you to a detail page displaying further details of the individual initiative.

Marginal Abatement Cost Curves

Marginal Abatement Cost Curves (MACCs) are widely accepted as the best way to analyse the benefits and costs associated with CO_2 reduction initiatives. In addition to looking at reduction initiatives from a straight Return On Investment (ROI) perspective MACC's also take into account the total amount of CO_2 emissions reduction and the cost of purchasing CO_2 allowances. For these reasons CloudApps Sustainability Suite implements Marginal Abatement Cost Curves as a mechanism for evaluating the cost and the impact (measured in emission reductions) of GHG reduction initiatives.

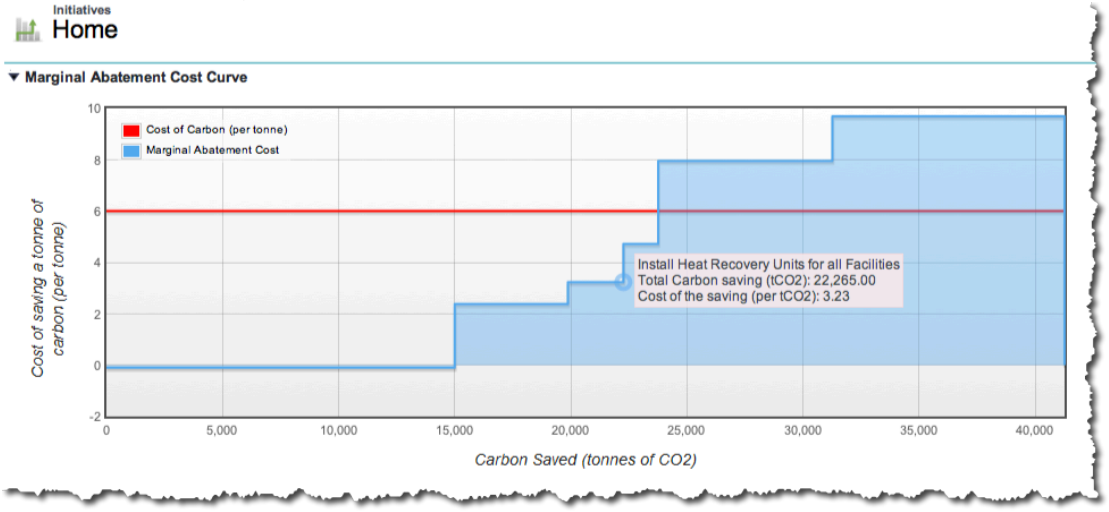


Figure 12.1 Initiatives – Marginal Abatement Cost Curve

Positioning your mouse pointer on any of the 'steps' on the MACC chart will reveal the name of the Initiative to which it applies (as show above).

Note

Note that the MACC chart will only be displayed if there are one or more Sustainability Initiatives that have the necessary data and have been flagged for display.

Viewing Individual Initiatives

The list of initiatives displayed below the MACC chart is a complete list of the initiatives that have been established for your organisation. However only those initiatives where the **Include on MACC?** Field has been checked will appear on the MACC chart.

Those that do appear are displayed ranked from left to right showing which initiatives deliver the lowest cost of saving a tonne of carbon first (expressed as a cost in your defined unit of currency per tonne of CO_2). The current cost of purchasing carbon allowances is drawn as a red line across the chart. This cost of carbon is set by the Sustainability Administrator in the Application Settings.

Defining an Initiative

To define a new initiative click on the **Initiatives** tab and then click on the **New Initiative** button in the header of the initiatives list below the MACC chart. When defining a new initiative via the user interface you will be required to select the initiative record type. Select one of the two initiative record types from the picklist and then click **Continue.**

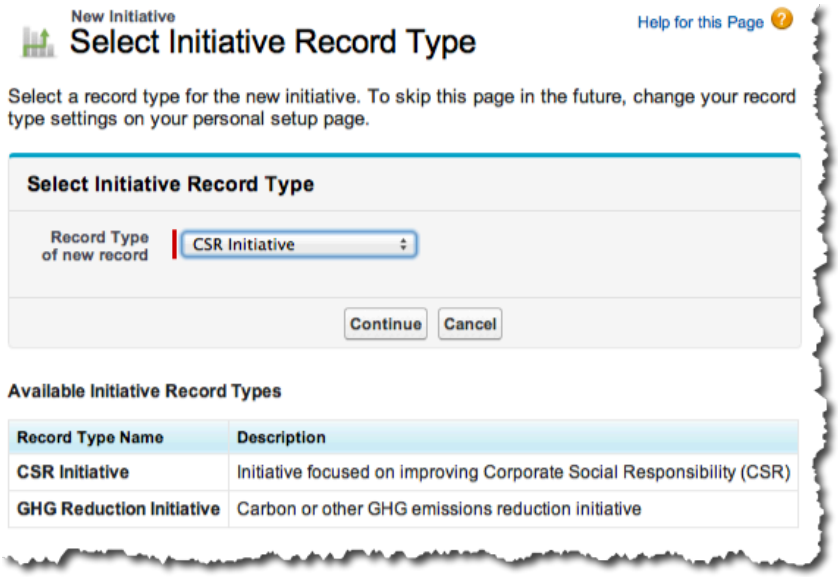

New Initiative
Select Initiative Record Type
Help for this Page
Select a record type for the new initiative. To skip this page in the future, change your record type settings on your personal setup page.
Select Initiative Record Type
Record Type of new record
CSR Initiative
Continue
Cancel
Available Initiative Record Types
Record Type Name
Description
CSR Initiative
Initiative focused on improving Corporate Social Responsibility (CSR)
GHG Reduction Initiative
Carbon or other GHG emissions reduction initiative

Figure 12.2 Initiatives – Selecting the Initiative Record Type

You will be taken to a New Initiative Edit page ready to enter the details of a new initiative. The initiative record type you choose will govern the subsequent fields that are then available.

Fields shared across both record types

Many initiative fields are common across both the initiative record types. These common fields are described first. Fields that are specific to only the GHG Reduction Initiative record type are described in the following record type sub-section.

Information

Initiative Name: Enter a name that uniquely identifies the initiative. This name will appear in your reports and dashboards.

% Reduction/Increase Goal: Enter the expected goal of the initiative, expressed as a percentage (either positive or negative).

Description: Enter a description of the initiative, providing enough information for someone new to the initiative to be able to understand it and it's objectives.

Additional Information: If there are further sources of information available (on the intranet or the internet) regarding this initiative then enter the URL here. For example the Carbon Trust provide details of several energy saving initiatives on their website (http://www.carbontrust.co.uk/cut-carbon-reduce-costs/products-services/technology-advice/pages/default.aspx) and the appropriate URL could be entered here in order to gain access to these additional details.

Type: Use the picklist to select the type of initiative.

Start Date: Enter the start date for implementing the initiative.

End Date: Enter the end date for the implementation of the initiative. This can be the anticipated end date (for initiative that have not yet been completed) and the actual end date for those that have been completed.

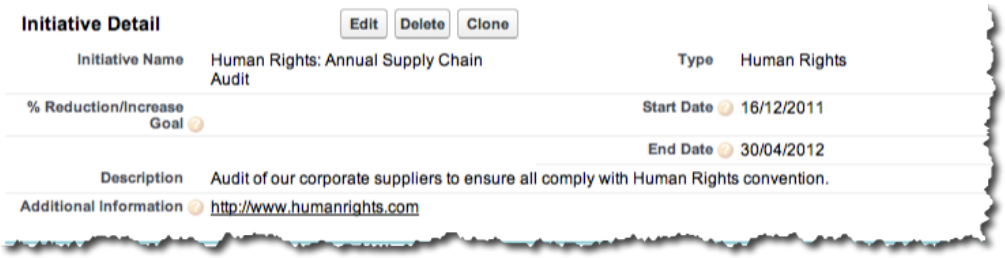


Figure 12.3 Initiatives – Initiative Information

Initiative Status

Initiative Status: Select the current status of the initiative from the picklist.

Progress Update: Provide a short progress update to go along with the status. This will help others to better understand the current progress of the initiative.

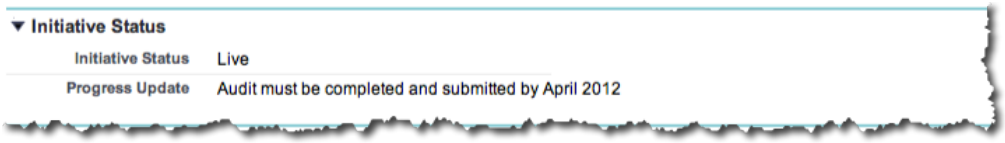


Figure 12.4 Initiatives – Initiative Status

Initiative Financials

Initiative Life (years): This is the anticipated lifetime over which the initiative is expected to deliver its benefits. This value should be entered in years.

Capital Cost: Enter the capital investment required to implement the initiative.

Annual Benefit/Cost: Enter the annual monetary benefit after the annual costs have been taken into account.

Figure 12.5 Initiatives – Initiative Financials

GHG Reduction Initiatives

Many initiative fields are common across both the initiative record types. These common fields are described first. Fields that are specific to only the GHG Reduction Initiative record type are described in the following record type sub-section.

Initiative Financials (Additional Fields)

Average tCO2 Savings (per annum): Enter the net savings in tCO2e emissions (per annum) gained as a consequence of implementing the reductions program.

Average kWh Savings (per annum): Enter the net savings in kWh of energy (per annum) gained as a consequence of implementing the reductions program.

Calculated Discount: The Carbon Trust currently recommends that a 10% discount rate be used for all Reductions initiatives submitted to them. For internal use enter a discount rate that reflects your organisation's criteria for return on investments.

NPV: The net present value for the project is then the capital cost less the NPV of the benefits.

Discounted Life Savings of Carbon: If you are required or intend to sell or buy carbon credits or allowances in the future, then carbon saved has a value in the future. You should therefore discount the value of the CO2 saved. By discounting the value of the carbon saved in the marginal abatement cost of an initiative, you obtain a cost per tonne that you can compare directly with the future price of carbon credits (that you might otherwise have bought instead of investing in the abatement project).

MAC (Carbon Not Discounted): This measure is appropriate if you do not assign a monetary value to the carbon saved.

MAC (Carbon Discounted): This measure is appropriate if you assign a monetary value to the carbon saved.

Include on MACC?: Check this field in order to enable its inclusion on the Marginal Abatement Cost Curve (displayed on the main Reductions tab page.).

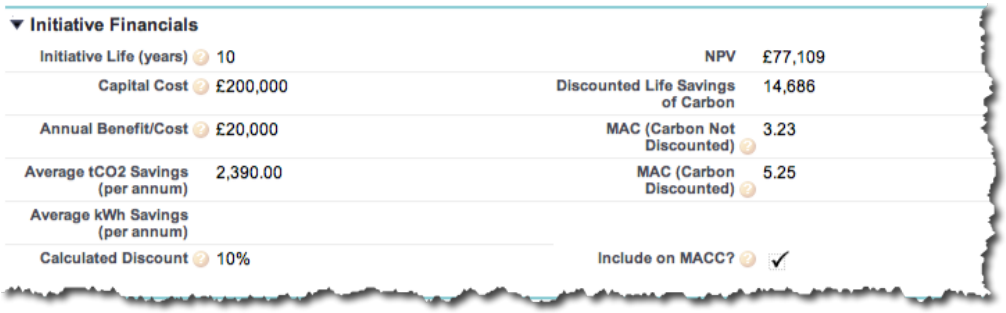


Figure 12.6 Initiatives – Initiative Financials (Extended)

Related Information

Additional information and documents can also be recorded against each initiative. This related information could be entered in the form of activities (aka tasks and events) that can be assigned to individuals and tracked. These activities can be placed on individual's calendars, with notifications via email or pop-up. Activities can also be prioritised, re-assigned and set to reoccur. Communications (such as email and phone calls) can also be tracked and recorded against the initiative allowing its implementation to be centrally managed and co-ordinated. Additionally the ability to attach notes and attachments to the initiative has also been provided.

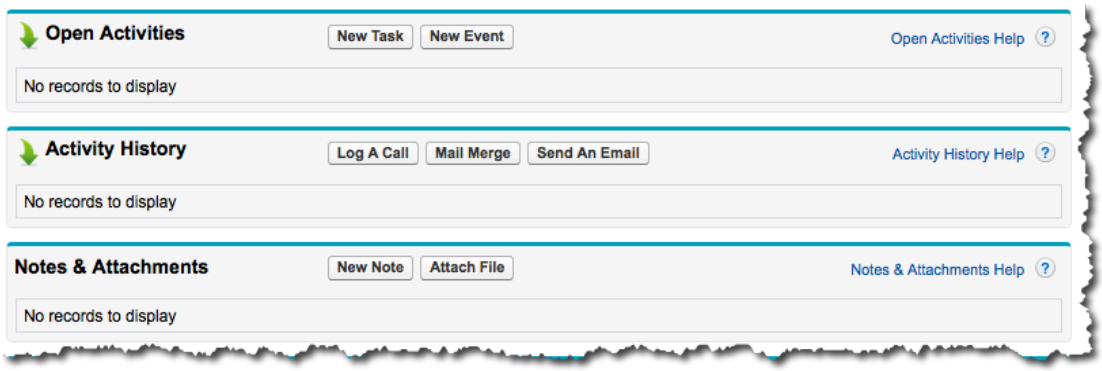


Figure 12.7 Initiatives – Related Information (Related Lists)

Dashboards & Reports

Dashboards Overview

Dashboards provide a real-time snapshot of the information contained in the CloudApps Sustainability Suite. The information is presented graphically in a series of charts that are easy to customise. Each graph is based on an underlying report that can also be customised in order to provide exactly the right level of information for an organisation to understand and manage all its Sustainability requirements.

Each dashboard can contain up to 20 different components. You can position each dashboard component in one of up to three columns. By default eleven Dashboards are provided (ready to be used out of the box or to be copied and customized for each organisation's own individual requirements).

Viewing Dashboards

Dashboards can be viewed by selecting the **Dashboards** tab in the application. To select the individual dashboards select them by name from the View Dashboard picklist at the top of the Dashboard page. By default you will be presented with the last dashboard you were viewing whenever you return to the Dashboards tab. The data in the dashboards is not automatically refreshed. To refresh the data on which the dashboards are based click the **Refresh** button. The following is a high level overview of the standard dashboards and charts that they contain.

Executive Overview

This dashboard displays a high level overview of the most salient information contained within the CloudApps Sustainability Suite. This information focuses on the costs and the savings of Sustainable operations. This dashboard includes the following charts as standard:

Goal Progress – Current Period: This list displays the progress of the organisations current Sustainability Goals. Those goals that are projected to perform best against their respective budget/target for the current period are ranked at the top of the list. Use this chart to identify the best and worst performing goals in the current period.

Inventory Costs - Current Year: Total cost by inventory for the current calendar year to date. This information is presented as a donut chart by inventory showing costs (and percentage on hover). Use this chart to identify which inventories contribute the largest costs in the current year.

Initiative Annual Financial Benefits - By Status: This funnel chart shows the annual benefits/costs of initiatives grouped by their status. Use this chart to access the composition of the initiatives pipeline.

Carbon Savings – Year on Year: This chart shows the carbon emission savings (positive) or carbon emissions increase (negative) versus the previous year. The data is presented as a vertical bar chart with a bar for the current year and each of the two previous years. Use this chart to see the size of emissions savings versus the previous year.

Electricity Cost Savings – Year on Year: This chart shows the cost savings from electricity (positive) or cost increase (negative) versus the previous year. The data is presented as a vertical bar chart with a bar for the current year and each of the two

previous years. Use this chart to see the size of cost savings from electricity versus the previous year.

Business Travel Cost Savings – Year on Year: This chart shows the cost savings from business travel (positive) or cost increase (negative) versus the previous year. The data is presented as a vertical bar chart with a bar for the current year and each of the two previous years. Use this chart to see the size of cost savings from business travel versus the previous year.

Carbon Emissions and Costs – Current Year: This chart shows the carbon emissions and the costs incurred creating those emissions in the current year. The information is presented in a mixed chart on a monthly basis. Carbon emissions (Total GHG tCO2e) are shown as a series of bars whilst the cost incurred creating those emissions are shown as a line. Use this chart to see the quantity of emissions and the costs incurred creating those emissions on a monthly basis for the current year. Note that in addition to the costs incurred creating the emissions there may also be additional carbon costs if your organisation needs to purchase allowances/ credits or chooses to purchase carbon offsets.

Electricity Usage and Costs – Current Year: This chart shows the electricity consumption and the cost of purchasing the electricity used for the current year. The information is presented in a mixed chart on a monthly basis. Electricity consumption (in kWh) is shown as a series of bars whilst the cost of purchasing the electricity used is shown as a line. Use this chart to see the costs and amounts of electricity consumed on a monthly basis for the current year.

Business Travel Emissions and Costs – Current Year: This chart shows the carbon emissions resulting from business travel by employees and the costs incurred in the current year. The information is presented in a mixed chart on a monthly basis. Business travel carbon emissions (Total GHG tCO2e) are shown as a series of bars whilst the cost of business travel related purchases are shown as a line. Use this chart to see the quantity of business travel emissions and the costs of business travel related purchases on a monthly basis for the current year.

Dashboard
Executive Overview
« Go to Dashboard List
Help for this Page
View Dashboard
Type here to search for a dashboard...
Edit
Clone
Refresh
Last refreshed at 21/12/2011 16:13
Viewing dashboard as: Free Trial Admin
Goal Progress
Current Period
Goal: Goal Name
Largest (Projected) Variance vs Baseline %
100% increase in Volunteer Hours by 2015 based on 2009 2
5% reduction in Recycled Waste by 2015 based on 2009 3
25% reduction in Business Travel Emissions per FTE by 2015 22
20% reduction in Electricity by 2015 versus our 2009 consumption 35
25% reduction in Gas by 2015 based on 2009 consumption 38
20% reduction in Water supplied by 2015 based on 2009 baseline 51
25% reduction in CO2 from Fuel & Electricity by 2015 based on 2009 emissions 53
15% reduction in Workpace Safety Incidents by 2013 based on 2009 199
15% reduction in Waste to Landfill by 2015 based on 2009 571
15 times increase in Charitable Donations by 2015 based on 2009 1K
20 times increase in Fundraising by 2015 based on 2009 1K
Inventory Costs
Current Year
Sum of Cost (Thousands)
Inventory Name
Public Transport
Private Transport
Health & Safety Incidents
Electricity
Fuel
Waste to Landfill
Water Supply
Waste Recycled
Volunteering
Health & Safety Lost Time
Fund Raising
Charitable Donations
Initiative Annual Financial Benefits
By Status
Sum of Annual Benefit/Cost (Thousands)
Initiative Status
Idea
Approved
Live
Completed
Carbon Savings
Year on Year
Carbon Saving (tonnes)
Source Date Time
CY2010
CY2011
Electricity Cost Savings
Year on Year
Cost Saving from Previous Year
Source Date Time
Public Transport Cost Savings
Year on Year
Cost Saving from Previous Year
Source Date Time
Electricity Usage and Costs
Curent Year
Public Transport Travel and Costs
Current Year

Figure 13.1 Dashboards – Executive Overview

Energy Consumption

This dashboard displays information for fuel and purchased energy sources in kWh, All information is converted to kWh in order to provide comparison between fuels (scope 1) and purchased energy (scope 2). This dashboard includes the following charts as standard:

Energy Consumption – Year on Year: Total energy presented as a side-by-side vertical column chart by month. A column is displayed for the energy consumed in each month for successive years. Use this chart to compare energy consumption during the same month in successive years.

Energy Consumption by Scope - Current Year: Total energy for the current year presented as a donut chart by scope. Use this chart to see the composition of energy use by scope for the current year.

Energy Consumption by Type – Current Year: Total energy for the current year presented as a stacked horizontal column chart. Within each bar the energy subtype is displayed. Use this chart to see the composition of energy use within energy type (e.g. Fuel, Electricity, Heat Steam etc.) for the current year.

Energy Consumption by Type - Over Time (Quarterly): Total energy over time presented in a line chart on a quarter-by-quarter basis. Use this chart to see the total amount of energy consumed by type on a quarterly basis.

Energy Consumption by Supply Type: Total energy from metered sources for the current year presented as a pie chart. Each segment of the pie represents the different supply types of metered energy sources. Use this chart to compare the percentage and quantity of energy from different metered supply types.

Energy Consumption by Geography – Current Year: Total energy for the current year presented as a stacked vertical column chart by geography. The energy

consumed is further segmented by scope within geographic region to provide comparison of the scope mix between different regions.

Energy Consumption by Division – Current Year: Total energy for the current year presented as a list by business division.

Energy Consumption by Facility – Current Year: Total energy for the current year presented as a list by facility.

Energy Consumption by Asset: Total energy for the current year presented as a stacked vertical bar chart by asset. The bar chart is further segmented by scope to provide comparison of the scope mix between different assets.

Figure 13.2 Dashboards - Energy Consumption

Carbon Emissions Inventory

This dashboard displays information on Total Greenhouse Gas emissions in tonnes of CO2 equivalent (Total GHG tCO2e). The GHG emissions have been calculated by the application from the source item information provided in various different units of measure. This information has then been accumulated in the relevant GHG inventories and then aggregated together for display in this dashboard. This dashboard includes the following charts as standard:

Carbon Emissions – Year on Year: Total GHG tCO2e displayed monthly, calendar year on calendar year for comparison. The information is presented as a vertical column chart by Date. Use this chart to see if your organisations monthly carbon emissions is increasing or decreasing compared to the same period in previous years.

Carbon Emissions by Scope: Total GHG tCO2e displayed for the current year. The information is presented as a donut chart by scope. Use this chart to see the amount (and percentage on hover) of emissions that are derived from each of the three scopes.

Carbon Emissions by Type: Total GHG tCO2e displayed by resource type for the current year. The information is presented as a side-by-side vertical column chart by

Subtype. Use this chart to compare carbon emissions between types (e.g. Fuel, Electricity, Passenger Transport etc.) for the current calendar year. The information provided for each type is further sub-divided by subtype in order to assess makeup of each type.

Carbon Emissions by Type - Over Time (Quarterly): Total GHG tCO2e displayed quarterly by type. The information is presented as a line chart by Date. Use this chart to compare carbon emissions between types (e.g. Fuel, Electricity, Water, Passenger Transport etc.) on a quarter-by-quarter basis.

Carbon Emissions by Geography: Total GHG tCO2e displayed by geographic region for the current year. The information is presented as a stacked vertical column chart by Scope. Use this chart to compare carbon emissions between geographies for the current year. The information provided for each geographic region is further sub-divided by scope in order to assess differences between scopes across geographies.

Carbon Emissions by Facility: Total GHG tCO2e displayed by Facility for the current year. The information is presented as a list with Total GHG tCO2e totalled up for each Facility. Use this chart to compare carbon emissions between Facilities for the current year.

Carbon Emissions by Division: Total GHG tCO2e displayed by Business Division for the current year. The information is presented as a stacked horizontal column chart by Scope. Use this chart to compare carbon emissions between Business Divisions for the current year.

Carbon Emissions by Usage: Total GHG tCO2e displayed by Usage for the current year. The information is presented as a donut chart by Usage. Use this chart to compare carbon emissions between types of Usage for the current year.

Carbon Emissions by Asset: Total GHG tCO2e displayed by Asset for the current year. The information is presented as a list with Total GHG tCO2e totalled up for each Asset. Use this chart to compare carbon emissions between Assets for the current year.

Figure 13.3 Dashboards - Carbon Emissions Inventory

Business Travel Emissions

This dashboard displays Total GHG emissions resulting from Business Travel. This dashboard includes the following charts as standard:

Business Travel – Current Year: Total GHG tCO2e from business travel displayed monthly for the current calendar year. The information is presented as a vertical column chart by Date. Use this chart to see if your organisations monthly carbon emissions from business travel are increasing or decreasing.

Business Travel – Over Time (Quarterly): Total GHG tCO2e from business travel displayed quarterly over time. The information is presented as a line chart by Date. Use this chart to see if your organisations quarterly carbon emissions from business travel are increasing or decreasing over time.

Business Travel – Year on Year: Total GHG tCO2e from business travel displayed monthly for the current and previous calendar years. The information is presented as a side-by-side vertical column chart by Date. Use this chart to see how your organisations monthly carbon emissions from business travel are changing relative to the same month in the pervious year.

Business Travel by Mode of Transport – Over Time (Quarterly): Total GHG tCO2e from business travel displayed quarterly over time. The information is presented as a multi-line chart by Date. Use this chart to compare your organisations quarterly carbon emissions from business travel by the mode of transport being employed.

Business Travel by Geography – Current Year: Total GHG tCO2e from business travel displayed by geographic region for the current year. The information is presented as a donut chart by geography. Use this chart to compare carbon emissions from business travel between geographic regions for the current year.

Business Travel by Geography & Mode of Transport – Current Year: Total GHG tCO2e from business travel displayed by geographic region for the current year. The information is presented as a stacked horizontal column chart by mode of transport (subtype). Use this chart to compare carbon emissions from business travel between geographic regions for the current year. The information provided for each geographic region is further sub-divided by mode of travel in order to assess differences in the mode of travel employed between regions.

Business Travel by Division – Current Year: Total GHG tCO2e from business travel displayed by business division for the current year. The information is presented as a donut chart by division. Use this chart to compare carbon emissions from business travel between business divisions for the current year.

Business Travel by Division & Mode of Transport – Current Year: Total GHG tCO2e from business travel displayed by business division for the current year. The information is presented as a stacked horizontal column chart by mode of transport (subtype). Use this chart to compare carbon emissions from business travel between business divisions for the current year. The information provided for each division is further sub-divided by mode of travel in order to assess differences in the mode of travel employed between divisions.

Business Travel by Facility & Mode of Transport – Current Year: Total GHG tCO2e from business travel displayed by facility for the current year. The information is presented as a stacked vertical column chart by mode of transport (subtype). Use this chart to compare carbon emissions from business travel between facilities for the current year. The information provided for each facility is further sub-divided by mode of travel in order to assess differences in the mode of travel employed between employees located at different facilities.

Figure 13.4 Dashboards - Business Travel Emissions

Corporate Social Responsibility

This dashboard displays information on Corporate Social Responsibility activities. This dashboard includes the following charts as standard:

Volunteer Hours - Over Time (Quarterly): Total volunteer hours presented on a line chart quarterly over time. Use this chart to see the total number of hours volunteered on a quarterly basis.

Volunteer Hours by Division: Total volunteer hours contributed by employees presented as a donut chart by business division. Use this chart to see which divisions have been the largest contributors of volunteer hours.

Volunteer Hours by Geography: Total volunteer hours contributed by employees presented as a pie chart by geographic region. Use this chart to see which regions have been the largest contributors of volunteer hours.

Health and Safety Incidents – Year on Year: Total number of H&S incidents presented as a side-by-side vertical column chart by month. Use this chart to compare the number of incidents during the same month for successive years.

Health and Safety Lost Time - Over Time (Quarterly): Total time (in hours) lost to H&S incidents presented on a line chart quarterly over time. Use this chart to see the total number of time lost to H&S incidents on a quarterly basis.

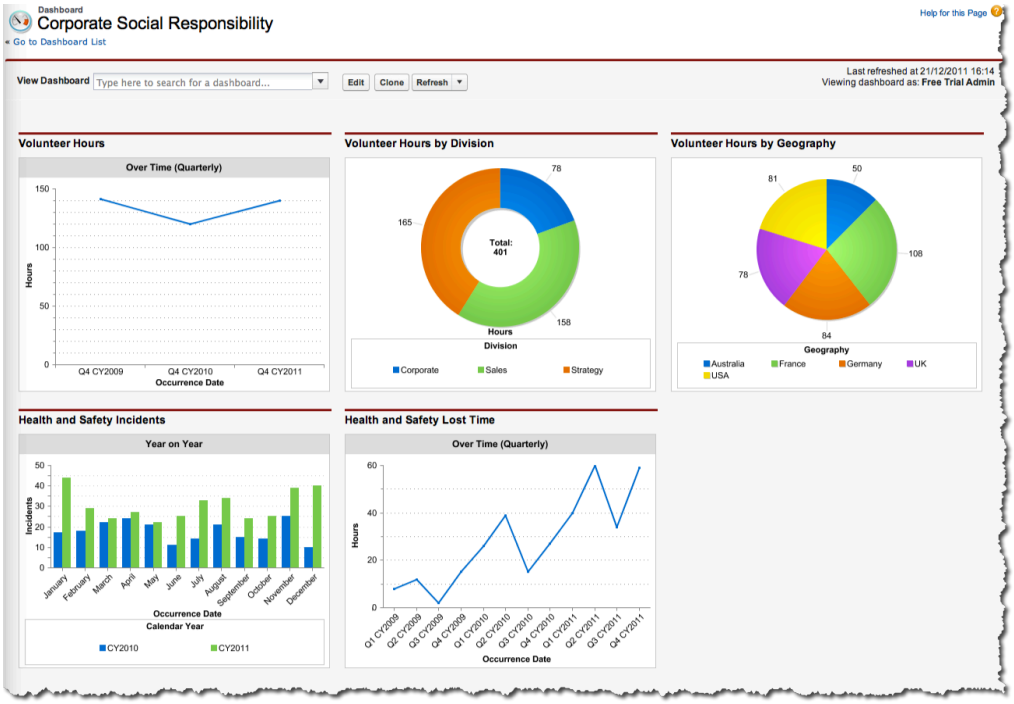


Figure 13.5 Dashboard - Corporate Social Responsibility

Water Supply

This dashboard displays information on the volume of water supplied. This dashboard includes the following charts as standard:

Water Supply – Year on Year: Water supplied presented as a vertical column chart for the current and previous calendar years. Use this chart to compare the volume of water supplied year on year.

Water Supply – Over Time (Quarterly): Water supplied across an open time period presented as a line chart on a quarterly basis. Use this chart to see quarterly volume of water supplied over time.

Water Supply by Geography – Current Year: Water supplied for the current year presented as a vertical column chart by geographic region. Use this chart to compare the volume of water supplied between regions.

Water Supply by Division – Current Year: Water supplied for the current year presented as a list by business division. Use this chart to compare the volume of water supplied between divisions.

Water Supply by Facility – Current Year: Water supplied for the current year presented as a list by facility. Use this chart to compare the volume of water supplied by facility.

Water Supply by Usage – Current Year: Water supplied for the current year presented as a list by usage.

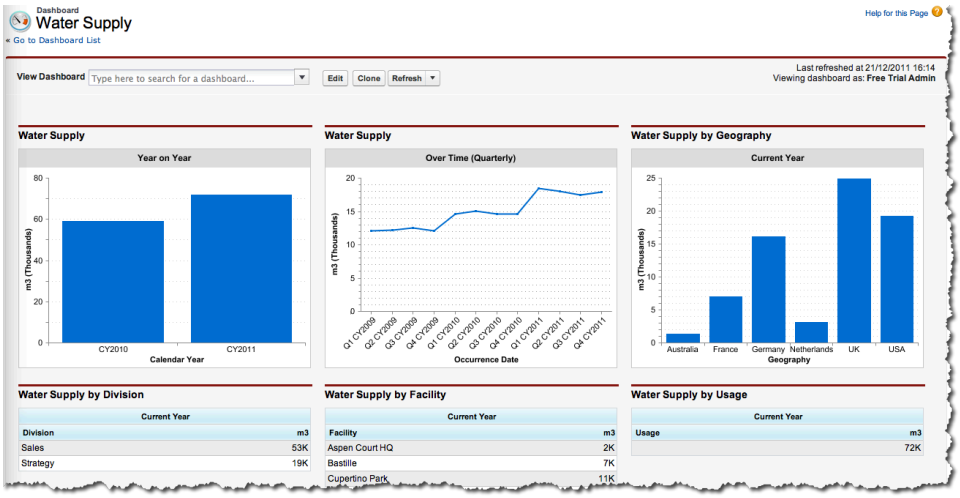


Figure 13.6 Dashboards – Water Supply

Waste Disposal

This dashboard displays information on the weight of waste disposed of in tonnes. This dashboard includes the following charts as standard:

Waste Disposal by Method - Over Time (Quarterly): Waste Disposal across an open time period presented as a multi-line chart on a quarterly basis. Each line represents a method of waste disposal. Use this chart to compare the different methods of waste disposal on a quarterly basis.

Total Waste Disposal – Year on Year: Total Waste Disposed of presented as a side-by-side vertical column chart for the current and previous year. The total amount of waste disposed of by method is presented side-by-side for the current and previous year. Use this chart to compare the methods of waste disposal year on year.

Waste Disposal by Stream - Over Time (Quarterly): Waste Disposal across an open time period by stream (types of waste) presented as a line chart on a quarterly basis. Use this chart to see trends in the types of waste being disposed of over time.

Method of Disposal by Geography – Current Year: Waste Disposal for the current year presented as a stacked vertical column chart by geography. Each bar (geographic region) is sub-divided to show the method of disposal. Use this chart to compare the methods and total amounts of waste disposed between regions.

Disposal by Geography – Current Year: Total waste disposal quantities for the current year presented as a list by geographic region.

Method of Disposal by Division – Current Year: Waste Disposal for the current year presented as a stacked horizontal column chart by business division. Each bar (business division) is sub-divided to show the method of disposal. Use this chart to compare the methods and total amounts of waste disposed between divisions.

Disposal by Division – Current Year: Total waste disposal quantities for the current year presented as a list by business division.

Method of Disposal by Facility – Current Year: Waste Disposal for the current year presented as a stacked vertical column chart by facility. Each bar (a facility) is sub-divided to show the method of disposal. Use this chart to compare the methods and total amounts of waste disposed between facilities.

Disposal by Facility – Current Year: Total waste disposal quantities for the current year presented as a list by facility.

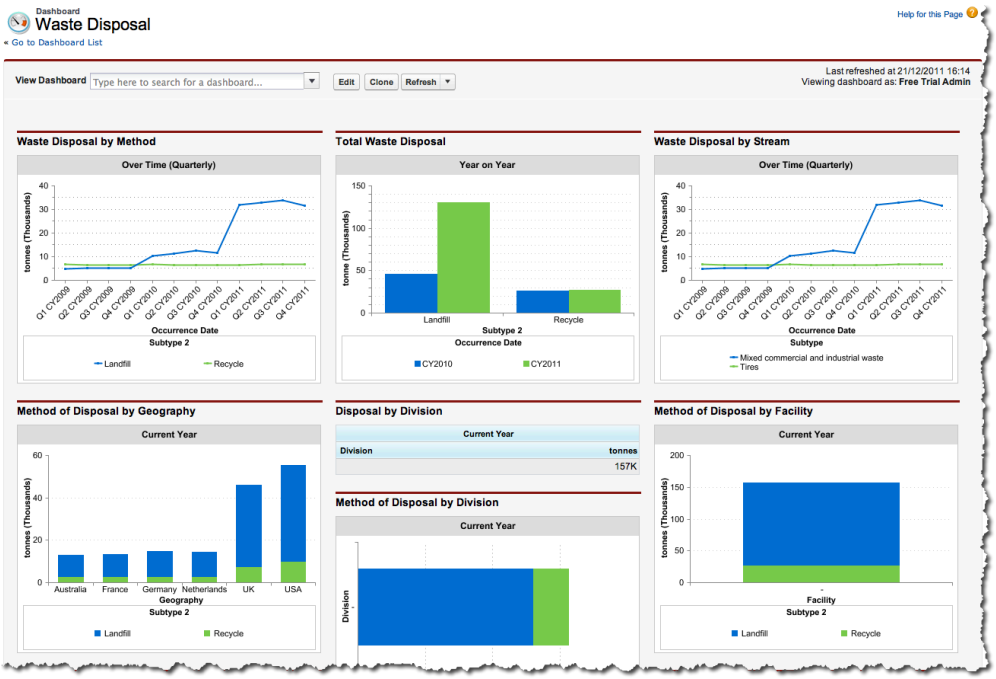


Figure 13.7 Dashboards - Waste Disposal

Sustainability Initiatives

This dashboard displays information on Sustainability Initiatives (Reduction Programs and CSR Initiatives). The information is presented both in terms of the financial savings, cost/ benefits and savings of total Greenhouse gas emissions (where appropriate).

Reduction Program Pipeline: This chart displays the total annual cost benefits that are expected from the implementation of reductions programs. The annual cost benefits are presented in a funnel chart segmented by initiative status. Use this chart to see the size of the savings that could be achieved (segmented by the status of the programs).

Reduction Savings - Over Time (Annual): This chart displays the cumulative annual cost savings from reductions programs over time. The cumulative annual savings are presented as a line graph by the start date of the reductions program and summed per annum.

CSR Program Pipeline: This chart displays the total annual cost benefits that are expected from the implementation of CSR initiatives. The annual cost benefits are presented in a funnel chart segmented by initiative status.

Top 10 Reduction Programs: This table lists the average total GHG tCO2e savings per annum by reduction program. This list is presented in descending order.

Reduction Savings by Type: This chart displays the average total GHG tCO2e savings per annum by type. These average tCO2e savings are presented in a donut chart segmented by program type. Use this chart to see which type of reduction programs deliver the highest tCO2e savings on average.

Cost of Reduction Savings: This table displays the capital cost of reductions programs by the calendar quarter of their start date. Use this table to understand the capital investments that are required to implement reductions programs.

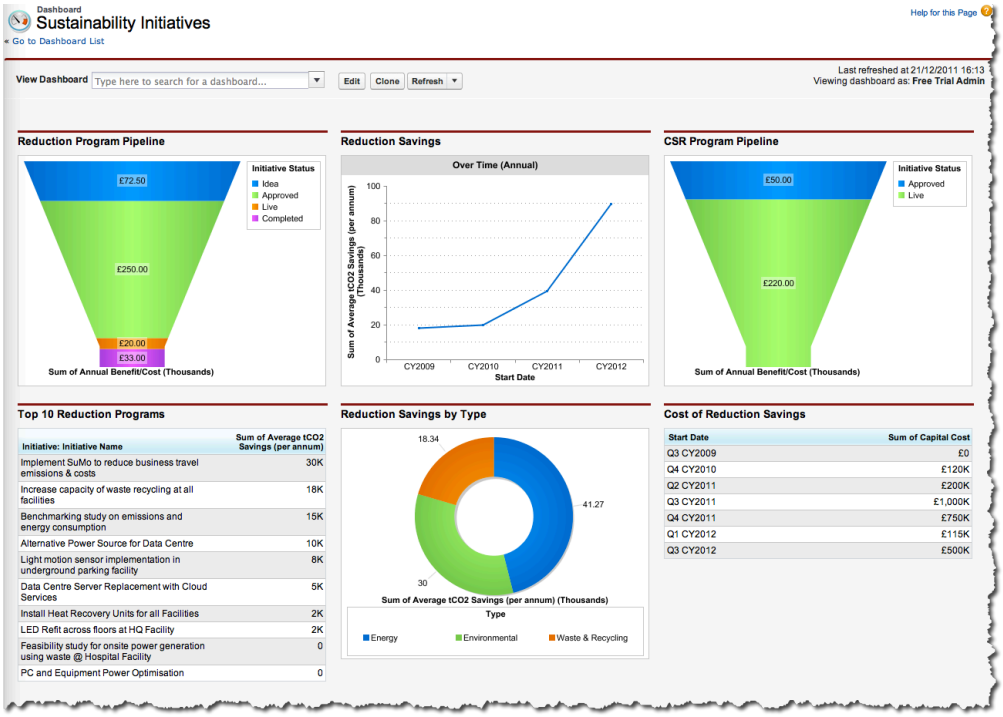


Figure 13.8 Dashboards - Sustainability Initiatives

CDP Emissions Disclosures

This dashboard displays information for voluntary CDP Disclosures, both those that have been submitted and those that are still in process. The carbon emissions data is displayed in tCO2e (as required by the Carbon Disclosure Project). This dashboard includes the following charts as standard:

CDP Disclosures Submitted: Total GHG tCO2e emissions displayed for each CDP disclosure that has been submitted. The information is presented as a vertical bar chart by disclosure. Use this chart to compare submitted CDP disclosures over time.

CDP Disclosures by Geography – Last Year: Total GHG tCO2e displayed by geographic region for the last years submitted CDP disclosure. The information is presented as a donut chart by geography. Use this chart to compare the carbon emissions between geographies in last year's submitted disclosure.

CDP Disclosure by Scope – Last Year: Total GHG tCO2e emissions displayed for last years submitted disclosure. The information is presented as a donut chart by scope within each disclosure. Use this chart to analyse changes in composition between scopes in last year's submitted disclosure.

CDP Disclosures in Progress: Total GHG tCO2e emissions displayed for each CDP disclosure that is in progress. The information is presented as a side-by-side vertical bar chart by disclosure. Use this chart to compare in progress CDP disclosures over time.

CDP Disclosures by Division – Last Year: Total GHG tCO2e displayed by business division for the last years submitted CDP disclosure. The information is presented as a donut chart by business division. Use this chart to compare the carbon emissions between divisions in last year's submitted disclosure. **CDP Disclosures by Facility – Last Year:** Total GHG tCO2e displayed by facility for the last years submitted CDP disclosure. The information is presented as a donut chart

by facility. Use this chart to compare the carbon emissions between facilities in last year's submitted disclosure.

Disclosures by Usage – Last Year: Total GHG tCO2e displayed by usage for the last years submitted CDP disclosure. The information is presented as a donut chart by usage. Use this chart to compare the carbon emissions between uses in last year's submitted disclosure.

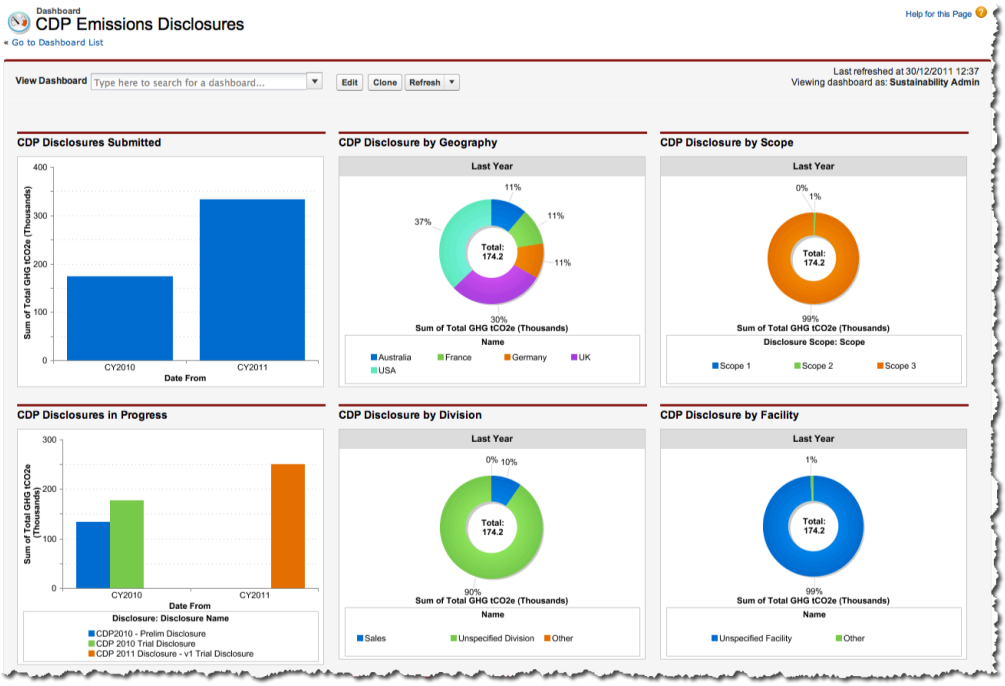


Figure 13.9 Dashboard - CDP Emissions Disclosure

CRC Emissions Disclosures

This dashboard displays information for regulatory CRC Disclosures, both those that have been submitted and those that are still in process. The carbon emissions data is displayed in tCO2 (as required by the CRC regulation). This dashboard includes the following charts as standard:

CRC Disclosures Submitted: Total tCO2 emissions displayed for each CRC disclosure that has been submitted. The information is presented as a vertical bar chart by Disclosure. Use this chart to compare submitted CRC disclosures over time.

CRC 90% Rule History: The percentage of CRC tCO2 total footprint emissions that have been declared, displayed for all submitted CRC disclosures. The information is presented as a line chart by Disclosure. Use this chart to compare percentage declared, note that under the CRC regulations this percentage must always be 90% or higher and must not decrease relative to the previous submission.

By Significant Group Undertaking – Last Year: Total tCO2 emissions displayed for last years submitted CRC disclosures. The information is presented as a donut chart segmented by SGU. Use this chart to analyse the percentage (and quantity on hover) of emissions being contributed to the disclosure by the Primary Member and each Significant Group Undertaking.

CRC Disclosures in Progress: Total tCO2 emissions displayed for each CRC disclosure that is in progress. The information is presented as a side-by-side vertical

bar chart by Disclosure. Use this chart to compare CRC disclosures in progress over time.

CTS Coverage History: The percentage of emissions that are covered by the Carbon Trust Standard (CTS), displayed for all submitted CRC disclosures. The information is presented as a line chart by submitted Disclosure. Use this chart to compare the percentage of CTS coverage over time.

AMR Coverage History: The percentage of emissions that are covered by voluntarily installed Automatic Meter Readers (AMR's) displayed for all submitted CRC disclosures. The information is presented as a line chart by submitted Disclosure. Use this chart to compare the percentage of AMR coverage over time.

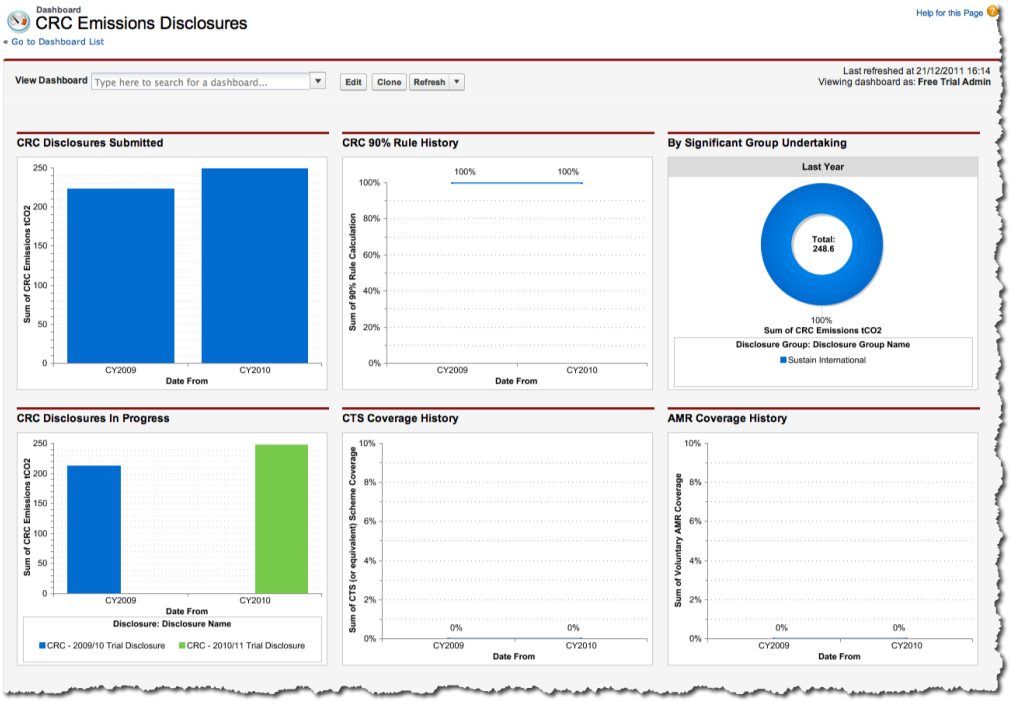


Figure 13.10 Dashboards - CRC Emissions Disclosure

Data Quality Dashboard

The purpose of this dashboard is to help the Sustainability Administrator understand the overall quality of the information stored in Electricity and Gas Meter Sources. This dashboard includes the following charts as standard:

Data Quality – Electricity Readings Equal To Zero: A record count of Source Items for Electricity Meters where the amount recorded (reading) is zero for the current and previous calendar year. Use this chart to assess the quality of Electricity Meter readings.

Data Quality – Electricity Readings Less than Zero: A sum of the total amount of electricity recoded as a negative amount displayed in a vertical bar chart by source. This information is shown for the current and previous calendar year. Use this chart to see which Electricity Meters contain negative Source Item amounts (readings).

Data Quality – Gas Readings Equal To Zero: A record count of Source Items for Gas Meters where the amount recorded (reading) is zero for the current and previous calendar year. Use this chart to assess the quality of Gas Meter readings.

Data Quality – Gas Readings Less than Zero: A sum of the total amount of natural gas recoded as a negative amount displayed in a vertical bar chart by source. This information is shown for the current and previous calendar year. Use this chart to see which Gas Meters contain negative Source Item amounts (readings).

Data Completeness – Electricity Readings Per Meter: A record count showing the number of readings per Electricity Meter for the last calendar year. This information is displayed in a horizontal bar chart. Use this chart to assess the completeness of Electricity Meter readings.

Data Completeness – Gas Readings Per Meter: A record count showing the number of readings per Electricity Meter for the last calendar year. This information is displayed in a horizontal bar chart. Use this chart to assess the completeness of Electricity Meter readings.

UK CRC – Invalid Supply Type and AMR Combination: A record count of all Source Items for Electricity Meters that have an invalid Supply type and AMR combination. Use this chart to assess the appropriateness of the data recoded for Electricity Meters.

UK CRC – Consumption Not Using CRC Source Key: A record count of all Scope 1 & 2 Source Items contained in UK Sources that are using non-CRC Source Keys. Use this chart to assess the appropriateness of emission factors being recorded for disclosure under the UK CRC legislation.

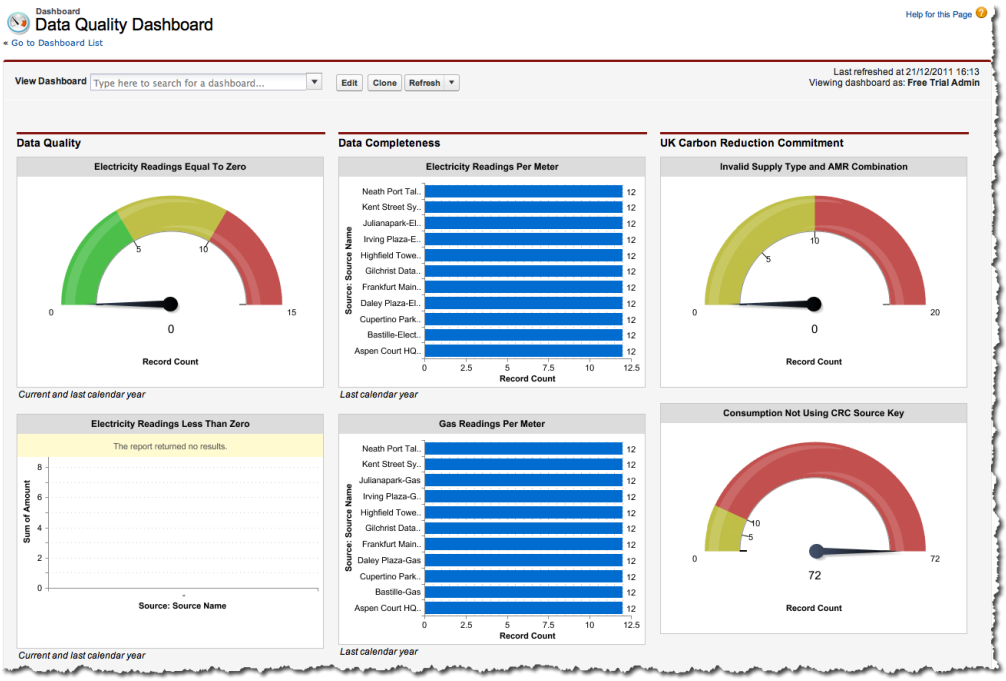


Figure 13.11 Dashboards – Data Quality

Customising and Adding Dashboards and Reports

The force.com platform on which CloudApps Sustainability Suite is built provides extensive capabilities and flexibility for quickly adding and modifying both dashboards and reports. These capabilities are described at a high level here, along with links to detailed information in the online salesforce.com Help & training guide.

Creating and Editing Dashboard Properties

How the dashboard is presented (its layout) and other properties such as the name, style, dashboard security and default chart settings can all be modified. For further details please see the relevant section of the Salesforce online Help & Training by clicking here. The dashboard components (the charts) can also be edited or new components added. For further details on Editing Dashboards in the online salesforce.com Help & training click here. As Dashboards are not upgradable components it is highly recommended that should you intend to make changes you should make a copy of the original Dashboard by performing a 'Save As' operation. Your copy should also be stored in a different folder to the original supplied by CloudApps Ltd.

Reports Overview

The Dashboards provided in the application are all based on reports. Reports are lists, summaries and analyses of your data that can then be displayed or printed. The data that they consist of can be filtered and grouped before being displayed in a customisable graphical chart. For a more detailed overview of reports please see the relevant section of the Salesforce online Help & Training by clicking here. To access the standard reports click on the **Reports** tab in the application.

Creating and Customising Reports

Standard reports provided by default in the application can be modified or cloned. For further details on creating and modifying reports please see the relevant section of the Salesforce online Help & Training by clicking here.

To modify an existing report, but save it as a new variant begin by editing the report on which you want to base your variant and then at the end of the process click the **Save As** button (not the **Save** button). This will then provide you with the ability to name your report and to select the report folder to place the report in. CloudApps recommend saving your report variants and new reports in a separate folder to those supplied by CloudApps.

Adding new Charts to Dashboards

New charts based on new reports that you have created can be added to the existing dashboards or to new dashboards. For details on adding components (e.g. charts) to dashboards please see the relevant section of the Salesforce online Help & Training by clicking here.

Appendix

Cookie Handling (all Browsers)

Cookies are used by the CloudApps Sustainability Suite application in order to enable normal operation. If your browser settings restrict the use of cookies you will need to ensure that the following sites are added to the list of websites that are allowed to use cookies.

salesforce.com
force.com
cloudapps.com

CloudApps Source Key Exchange

Sourcing the most appropriate GHG emission conversion factors can be a laborious process. Having to create and maintain a set of source keys that implement these factors can also be an additional administrative burden. In order to reduce the amount of time and effort involved in this task CloudApps have assembled together many of the most relevant GHG conversion factors for emissions sources from around the world and placed them into a centralised Source Key Exchange.

The process of sourcing and applying emission conversion factors is greatly simplified via the use of this facility, as it is directly accessible from within the *General Administration* section of the Administration Launch Pad. Within the Source Key Exchange it is possible to view clusters of keys along with a description of the types of keys contained within the cluster. The Sustainability Administrator is then able to load only those clusters that are most appropriate to his/her organisation. As and when these clusters of keys are updated the administrator will also be able to see the new revision number and download the latest updates.

Each set of emission factors is accessed via a unique Source Key. The process of tagging a Source Item with one of these keys will ensure that the relevant emission factors are used to calculate GHG emissions (provided that the relevant key has been loaded into the application). No warranty or guarantee of accuracy is provided by CloudApps regarding the download and use of these Source Keys and their associated GHG emission factors. It is recommended that the Sustainability Administrator validate the accuracy and appropriateness of the emission factors being utilised by viewing the keys in the Source Keys tab of the application.

Global Warming Potentials (GWPs)

Global Warming Potentials (GWPs) are used to compare the impact of the emission of equivalent masses of different GHGs relative to carbon dioxide. For example, it is estimated that the emission of 1 kilogram of methane will have the same warming impact[1] as 21 kilograms of carbon dioxide. Therefore the GWP of methane is 21. The GWP of carbon dioxide is, by definition, 1.

The emission factors provided by CloudApps in the Source Key Exchange incorporate global warming potentials relevant to reporting under UNFCCC, as published by the IPCC in its

Second Assessment Report, *Climate Change 1995, The Science of Climate Change: Summary for Policymakers and Technical Summary of the Working Group I Report* (page 22). These IPCC Second Assessment Report 100-year time span (SAR – 100 year) GWP factors are listed below for your convenience.

Greenhouse Gas	Chemical Formula	Global Warming Potential (100-year)[1]
Carbon Dioxide	CO_2	1
Methane	CH_4	21
Nitrous Oxide	N_2O	310
Sulphur Hexafluoride	SF_6	23,900

[1] Over the period of one century. The length of time a GWP is referenced to is important. 100 year GWPs were adopted for use under the UNFCCC Guidelines on Reporting & Review and the Kyoto Protocol.

User Profile Responsibilities

CloudApps SuMo User

The CloudApps SuMo User is an Employee only accesses the CloudApps Sustainability Suite via the optional Sustainability Momentum (SuMo) Employee Engagement application. Each Via the SuMo application each employee is able to perform the following duties:

- View their own performance score (Level, Experience, Points, Rank and Badge Counts).
- View the organisations Sustainability Vision
- View the Rewards that they have earned to date
- View the Performance Indicators that belong to Performance Centres for which they have been defined as the owner
- Create, Vote, Comment and View Ideas
- Create, Like Comment and View Chatter messages
- View a ranked Colleagues Leaderboard containing a performance summary (Level & Experience) for each colleague
- Send and accept friendship requests to/from other SuMo application users
- View a ranked Friends Leaderboard with the ability to drill in and see their friend's performance details (Level, Experience, Points, Rank, Badge Counts and Rewards).
- View, Pledge and be rewarded for taking Challenges (One-Off or Recurring). Rewards for Recurring Challenges can be given for Accepting, Repeating and Completing Challenges. Rewards can also be received for stand-alone achievements.
- View their organisations Sustainability Goals including period budgets and targets, plus actual and projected performance against those budgets and targets

The CloudApps SuMo User is able to log into the CloudApps Sustainability Suite via a Web Browser (and will have relevant access to the objects and data necessary to perform the duties and tasks described above). However these duties are only intended to be performed via the SuMo application not via a direct login from a Browser, therefore accessing the CloudApps Sustainability Suite directly is not recommended for SuMo Users.

CloudApps Sustainability Performance Manager

The CloudApps Sustainability Performance Manager is responsible for the following duties:

- Viewing Goals, Goal Periods and Goal Allocations
- Viewing Initiatives (plus Edit permissions for Activities, Notes & Attachments)
- View/Edit Performance Centres, Performance Periods and Performance Indicators (note that further configuration will be required post installation to further limit visibility to only those Performance Centres that are owned by the user and it's descendent Performance Centres if applicable)
- View certain Dashboards and run specific Reports.

The Sustainability Performance Manager has read only access (for reference) to Boundaries, Parties (Providers, Disclosing Organisations and SGU's) and Categories.

CloudApps Sustainability Administrator

The CloudApps Sustainability Administrator is responsible for the following duties:

- Maintenance of the Application Settings
- Creation and maintenance of reference data; Categories, Parties (Providers, Disclosing Organisations and SGU's), Boundaries and Disclosure Definitions.
- Loading and maintenance of standard Source Keys
- Creation and maintenance of custom Units and custom Source Keys
- Creation and maintenance of Inventories, Inventory Events and Agreements
- Creation of Performance Centres
- Creation and maintenance of Sources, Source Items and Source Allocations
- Calculation of Disclosures and the generation of Disclosure Reports
- Creation and maintenance of Goals, Goal Periods and Goal Allocations
- Creation and maintenance of Initiatives
- Executing the Posting Engine (Source Inventory Maintenance)
- Executing the Allocation Engine (Performance Centre Maintenance)
- Executing the Goals Engine (Goal Maintenance & Budget/Target Allocation)
- Reviewing the Posting Engine Audit Trail
- Reviewing the APEX job history
- Recalculating GHG Emissions (if necessary)

The Sustainability Administration user has full access to all objects.

System Administrator

In the context of the CloudApps Sustainability Suite application the System Administrator is responsible for the following duties:

- Importing reference data (e.g. Category & Party data)
- Importing Source and Source Item data.
- Importing any other data that may be required
- Applying application updates or patches
- Installing additional modules

Data Import Tools and Recommendations

Importing Data into an application is a task that is normally reserved for the System Administrator. By default the CloudApps Administrator and Sustainability Performance Manager profiles do not therefore include this capability. CloudApps recommends that this

responsibility remains with the System Administrator and that the System Administrator profile contains visibility of the CloudApps Sustainability application.

Recommended tools for Importing Data

For small and medium sized data files (containing less than 50,000 records) CloudApps recommends using the Import Wizard available from within the application. Other external tools and technologies can be used provided they are compatible with the Force.com platform.

For larger data volumes (above 50,000 records) CloudApps recommends the use of Data Loader (provided by salesforce.com) and available for installation from the application.

External data files must be in CSV (Comma Separated Values) format with the first row of the data file containing field names that match the field names used by the application.

Running the Import Wizard

To access the Import Wizard the System Administrator should select **Setup** from the user menu (the pull down list under your user name displayed in the application banner, at the top of the page) and then select **Administration Setup | Data Management | Import Custom Objects** from the setup side bar. For convenience a link to the Data Import Wizard has been placed on the *Inventory Management* section of the Administration Launch Pad (at the most appropriate stage of the Inventory Management Process, i.e. the stage for loading Source Item data).

Important

Only the System Administrator will have sufficient privileges to run the Import Wizard. Should the Sustainability Administrator attempt to run the Import Wizard they will receive an 'Insufficient Privileges' warning message.

Installing the Data Loader

To install Data Loader the System Administrator should select **Setup** from the user menu and then select **Administration Setup | Data Management | Data Loader** from the setup side bar. Click on the link provided to download the Data Loader (for Microsoft Windows).

Running the Data Loader

Once installed the Data Loader is run from the Microsoft Windows operating system. The tool can be run from the location in Windows into which it was installed. In order to run the tool the user will need to enter their security token appended to the end of their password. To request their security token the user should select **Setup** from the user menu and then select **Personal Setup | My Personal Information | Reset My Security Token** from the setup side bar. The user will then receive an email containing the security token details.

Glossary of Terms

Term	Description
Agreement	A collection of Posting Rules that define which Source Items should be posted to which Source Inventories by the Posting Engine
Automatic Meter Reading (AMR)	Under the CRC regulations an AMR electricity meter must be capable of capturing consumption data at least on a half-hourly basis (for gas on an hourly basis), be the main fiscal meter that is remotely read and the data made available to the customer
Boundary	A means of placing a boundary around the Data Sources of an organisation and its subsidiaries. Used in conjunction with Goals to ensure a like for like comparison over long periods of time.
Brown Electricity	Electricity that has typically been generated by burning fossil fuels
CH4	Methane gas
CO2	Carbon Dioxide gas
Calendar Year	A period of 12 months that starts on January the 1st and ends on December the 31st
Carbon Allowance	An allowance purchased from Government (or traders) that represents the right to emit one tonne of CO2
Carbon Disclosure Project (CDP)	A popular world-wide reporting standard that is used by companies that wish to voluntarily publish their greenhouse gas emissions
Carbon Reduction Commitment Energy Efficiency Scheme (CRC)	Legislation in the UK that requires all public sector organisations and larger private companies to report their scope 1 and scope 2 emissions on an annual basis
Carbon Trust Standard (CTS)	A certification from the Carbon Trust that an organisation has genuinely reduced its carbon footprint and is committed to making further reductions year-on-year.
Categories	Provide a means of segmenting sources by geography, business division, facility, usage and asset
Climate Change Agreements (CCA)	Agreements that allow energy intensive business users to receive a discount from the Climate Change Levy in return for meeting energy efficiency or carbon saving targets.
Climate Change Levy (CCL)	A tax on the use of energy in industry, commerce and the public sector put in place to encourage users to improve energy efficiency and reduce greenhouse gas emissions.
CloudApps Sustainability Administrator	The user(s) responsible for administering the CloudApps Sustainability Suite i.e. defining reference data, Sources and Source Allocations
CloudApps Sustainability Performance Manager	The user(s) responsible for performing day to day management of Performance Centres, viewing organisation wide goals and Initiatives.
Comma Separated Values (CSV)	A text file format for a database table where each record in the table is one line of the text file and where each field value is separated from the next with a comma

Core Supplies	Those supplies under the CRC scheme that an organisation is obliged to include in their annual report if they are not covered by CCA or the EU-ETS
Data Source	A source of sustainability data. This can include direct or indirect source of greenhouse gas emissions as well as Social and Economic (CSR) sources of information that is to be monitored and maintained.
DEFRA	Department for Environment Food and Rural Affairs (UK)
Dashboards	A set of easy to customise charts that provide a graphical real-time snapshot of the information contained in the application
Disclosing Organisation	The top level of organisation that has overall responsibility for disclosing the greenhouse has emissions for a company or group of majority companies
Disclosing Year	A period of 12 months with a start date that is defined as the first day of a disclosing period i.e. 1st April for CRC Disclosures
EBITDA	Earnings Before Interest, Tax, Depreciation and Amortisation
Emissions Factor	Values used to calculate greenhouse gas emissions for four greenhouse gases; carbon dioxide (CO2), methane (CH4), nitrous oxide (N2O), sulphur hexafluoride (SF6) and two groups of gases; hydroflourocarbons (HFCs) and perfluorocarbons (PFCs)
Entity Relationship Diagram (ERD)	A conceptual schema that shows the main entities (objects) and the relationships between them
EPA	Environmental Protection Agency (US)
European Union Emissions Trading Scheme (EU-ETS)	A greenhouse gas emission trading System covering the energy intensive sectors (power generation, cement, glass, ceramics, steel, aluminium, and pulp and paper) of the EU Member States
FTE	Full Time Equivalent
Feed-In Tariffs (FITs)	Incentives for small scale (less than 5MW), low carbon electricity generation that aim to encourage the deployment of additional low carbon electricity generation, particularly by organisations, businesses and communities not traditionally engaged in the electricity market.
Fiscal Year	A period of 12 months with a start date that is defined as the first day of an organisations fiscal reporting period
Force.com	Complete cloud-based infrastructure from database and security to workflow and user interface, provided by salesforce.com
Geocode	Geographic coordinates (i.e. latitude & longitude) used to show the position of an emissions source on a map
Greenhouse gases (GHG)	Gases in the atmosphere that absorb and emit radiation within the thermal infrared range (causing the greenhouse effect)
Goal	Used to define a corporate sustainability goal. Goals are typically over a number of years and divided into multiple periods. Goals can be focused on reduction or an increase and measurement is usually in comparison to a baseline period of time.
Goal Allocation	A means of allocating a percentage of a Goal's budget/target into Performance Indicators within Performance Centres.
Goal Period	The segmentation of Goals into periods of time i.e. a month, quarter or a year that contain period amounts (calculated from inventories) and budgets/targets for that period

Half-Hourly Meter (HHM)	A meter supplying electricity settled on the half hourly market where the average peak electricity demand over the three months of highest consumption exceeds 100kW during a 12 month period
HFCs	Hydroflourocarbon gases
IEA	International Energy Agency
Inventory	A master definition for each distinct type of inventory. The parent object for multiple Source Inventories of the same inventory type. i.e. Electricity, Total GHG Emissions, Volunteer Hours, H&S Incidents etc.
Inventory Balance	Maintains a monthly balance within each Source Inventory
Inventory Entry	Maintains an entry for an individual posting to a Source Inventory
Inventory Event	A label used to indicate to the posting engine which posting rules (within an Agreement) should be applied when posting the Source Item into the appropriate Inventory
IPCC	Intergovernmental Panel on Climate Change
ISO	International Standards Organisation
Information Disclosure	The mechanism for disclosing an organisation's greenhouse gas emissions to both regulatory and/or voluntary bodies
Key Body	Typically a group, organisation or other collective body that have published a set of emissions factors for calculating greenhouse gas emissions
KPI	Key Performance Indicator
Kyoto Protocol	A protocol to the United Nations Framework Convention on Climate Change aimed at fighting global warming (that came into force on the 16th February 2005)
Marginal Abatement Cost Curve (MACC)	A means of assessing greenhouse gas emissions and guiding decisions on capital investment programs i.e. reductions programs
Meter Point Administration Number (MPAN)	A 21 digit reference used in Great Britain to uniquely identify electricity supply points such as meters in commercial and domestic properties
Meter Point Reference Number (MPRN)	An 11 digit gas equivalent to a Meter Point Administration Number (MPAN) which is used to identify all UK gas meters
N2O	Nitrous Oxide gas
Organization	The virtual space (in the Cloud) on the Force.com information technology platform that contains the CloudApps Sustainability Suite application and all of your data
Performance Centre	A business structure for grouping together the performance indicators that the organisation as decided to monitor.
Performance Indicator	An indicator of performance for a specific Inventory within a known period (Performance Period) and a specific Performance Centre. Performance Indicators contain rolled up amounts and costs from descendent Performance Centres (arranged in a hierarchy) and can have budgets/targets assigned. Performance is also projected for the current period and can also be measured against a KPI.

Performance Period	The segmentation of Performance Centres into periods of time i.e. a month, quarter or a year that contain Performance Indicator data for that period
PFCs	Perfluorocarbon gases
Picklist	A list containing values that can be picked from in order to populate a field in the application
Platform as a Service (PaaS)	A computing platform and/or solution stack delivered as a service, which facilitates the deployment of applications without the cost and complexity of buying and managing the underlying hardware and software infrastructure. More typically referred to as Cloud Computing.
Posting Engine	An engine which executes the Posting Rules contained within an Agreement to create (post) Inventory Entries into Source Inventories for any un-posted Source Items
Posting Rules	Individual rules that control which Source Items create Inventory Entries in Source Inventories. Posting Rules also take into account the Inventory Event specified on the Posting Rule and also on the Source Item.
Provider	An organisation that provides products or services related to the consumption or disposal (directly or indirectly) of natural resources i.e. an energy provider or a waste disposal services provider.
Renewables Obligation Certificate (ROC)	A certificate issued to an accredited generator for eligible renewable electricity generated within the United Kingdom and supplied to customers within the United Kingdom by a licensed electricity supplier
Residual Supplies	Residual supplies are any energy supplies other than the CRC core supplies and listed in the CRC fuels table
SF6	Sulphur Hexafluoride gas
Significant Group Undertaking (SGU)	Any individual undertaking or grouping of undertakings within an organisation that would have met the qualification criteria for participation in CRC in its/their own right were it/they not part of a larger organisation
Scope 1	All direct greenhouse gas emissions
Scope 2	Indirect greenhouse gas emissions from consumption of purchased electricity, heat or steam
Scope 3	Indirect greenhouse gas emissions (not covered in scope 2), such as the extraction and production of purchased materials and fuels, transport-related activities in vehicles not owned or controlled by the reporting entity, outsourced activities, waste disposal, etc.
Source Allocation	A means of allocating a percentage of Source Inventory amounts and costs into Performance Indicators within Performance Centres.
Source Inventory	A detailed listing of entries (containing amounts and costs) of the same type for an individual Source i.e. Electricity, GHG Emissions, Volunteer Hours, H&S Incidents etc.

Source Key	A Key that contains tagging data that helps to identify the source item type and subtype (multiple levels). Also optionally identifies emissions factors for the four greenhouse gases and two groups of gases covered under the Kyoto protocol (also the scope, and origin of the information).
Sustainability Initiative	A program of work that is implemented by an organisation with the goal of reducing the amount of greenhouse gas emissions it produces
Sustainability Journey	A methodology to help organisations to recognise, communicate and maximise the value of their carbon assets
System Administrator	The user(s) that have overall responsibility for administering the CloudApps Sustainability Suite i.e. setting up users, managing profiles and importing data
Unit of Measure	Units used in conjunction with Source Keys that identify the unit that an amount is being measured in i.e. tonnes, kWh, hours etc.